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**Social marketing in Aotearoa New Zealand:**

**Analysing its evolution to**

**inform, improve, and justify its future.**

A thesis submitted in fulfilment

of the requirements for the degree

of

**Doctor of Philosophy in Business Futures and Leadership**

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by

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## **ABSTRACT**

Plotting the evolution and experience of social marketing in Aotearoa New Zealand, this thesis charts a creative landscape of productive future research directions in the field.

Starting with the question, “What can the social marketing discipline learn from the unique experience of social marketers in Aotearoa New Zealand?”, the research draws from appreciative inquiry interviews with 20 experienced social marketers and reviews of relevant government documents and published commentaries. Analysis of the findings sparked three substantive papers included in this thesis by publication: two of these have already been published, and one is currently being revised for resubmission. Presented in chapters four to six, the three papers analyse the growth and decline of social marketing in Aotearoa New Zealand; the overlapping functions of social marketing and public relations; and the incorporation of indigenous communities’ values into social marketing.

### **1. The growth and decline of social marketing**

In an original developmental framework for social marketing in Aotearoa New Zealand, the first of the three papers tracks four phases through four different governments as follows: (1) Foundation (1984-1990); (2) Establishment (1990-1999); (3) Growth (1999-2008); and (4) Decline (2008-2017). The research found that political support is key to enabling ongoing social marketing contributions to social change and argues for the development of an evidence base for effective communication to political decision-makers to attract such support.

## **2. Public relations, reputation and social marketing**

In identifying the strong interdisciplinary nature of social marketing in Aotearoa New Zealand, the second paper focuses on the intersections of public relations, marketing, advertising and health promotion. It illustrates how local definitions of, and practices within, social marketing draw from different disciplines.

Social marketing has also been shaped by the nation's founding document, Te Tiriti o Waitangi (The Treaty of Waitangi). The Crown's revised principles of Te Tiriti offer further opportunity to improve social marketing through indigenous autonomy, partnership, active protection, equity and options.

## **3. Decolonising social marketing through an indigenous lens**

The third paper tackles the question: can social marketing address health inequity between Māori and non-Maori? It deals with this question in the context of the international shift in social marketing away from a focus on individual change to a focus on societal and social change. The paper's findings support an ongoing critical analysis of social marketing from an indigenous worldview.

## **Conclusions**

Overall, the thesis looks at the impact of political ideologies on the function of social marketing and makes novel suggestions on how social marketing academics and practitioners can attract political support. It calls for increasing interdisciplinarity to engage effectively with contemporary issues and encourages social marketers to search for "soul" in organisations.

The thesis also identifies indigenous Māori culture as a potential inspiration for social marketers to improve their interactions with indigenous people in Aotearoa New Zealand as well as across the globe. It recommends that future social marketing interventions not only be informed by indigenous worldviews but also be led by indigenous communities involved from the planning stages.

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## CHAPTER 1: INTRODUCTION

This thesis contributes an original perspective from Aotearoa New Zealand<sup>1</sup> to the discipline of social marketing. It consists of three articles that analysed, for the first time, the growth and decline of the practice of social marketing in Aotearoa New Zealand, the overlapping functions of social marketing and public relations, and the challenge of engaging indigenous communities in social marketing interventions. The research that provided data for these articles was conducted between 2019 and 2021. It draws on a series of Appreciative Inquiry interviews with 20 leading social marketing practitioners, an extensive literature review that clarified social marketing concepts and underpinning theory, as well as evidence based on media stories and official documents. My own 20 years of experience in the practice of social marketing enriched the articles with strong connections with reliable sources of information and provided insights that would be hard to achieve in other ways. Two of the articles are published and one is currently being reworked following useful advice from peer reviewers and the editor of a leading journal.

This project emerged from my ongoing work in social marketing government, not-for-profit and commercial agencies in the United Kingdom, Australia and Aotearoa New Zealand. I am passionate about this relatively young discipline and believe that it deserves to

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<sup>1</sup> I use Aotearoa New Zealand in recognition of the two groups that call these islands home: tangata whenua – the indigenous peoples, commonly referred to as Māori – and tangata tiriti – the peoples for whom Te Tiriti o Waitangi (New Zealand's founding document, the Treaty of Waitangi) established their right to live here. I do this to recognise the two cultures that formed this nation and the challenges and strengths this has created. Any reference to Aotearoa or New Zealand should be seen as a recognition of both.

be better understood and recognised. Over the years I have noticed the frailty of the discipline in Aotearoa New Zealand and a lack of visibility of the lessons learned from past experiences. This acknowledgement raised my interest in investigating the potential explanations for the field's success and failure stories and it motivated me to take on an academic research in the framework of a PhD thesis with publication. I'm hopeful that my research offers a significant contribution to the social marketing community of practitioners, especially in Aotearoa, and to the academic discipline of social marketing worldwide.

In my initial exploratory work, I quickly identified a dearth of literature on the development of social marketing in Aotearoa New Zealand. The early success of the practice had led to publications on specific programmes aiming to influence specific audiences' behaviour and to change anti-social behaviours into responsible and healthy ones. These publications reported on specific interventions such as Smokefree/Auahi Kore (Crampton et al., 2011; Grigg et al., 2008; Hoek, 2015; Hoek & Jones, 2011; Muriwai & Glover, 2016), Like Minds Like Mine (mental health), cervical screening (Bethune & Lewis, 2009), Push Play (physical activity) (Bauman et al., 2003), Healthy Eating Healthy Action (McLean et al., 2009), It's Not OK (family violence) (Roguski, 2015) and papers that were prepared for government departments (Thornley & Marsh, 2010; Thornley & Waa, 2009). The opportunity to explore the untold history of social marketing in Aotearoa New Zealand before many of the early practitioners retired was irresistible.

My inquiry began with the purpose of documenting the evolution of social marketing in Aotearoa New Zealand with a view to informing, improving and justifying its future. My initial research question was "What can the social marketing discipline learn from the unique experience of social marketers in Aotearoa New Zealand?" The questions that evolved from this during the research are:

- What are the factors that practitioners of social marketing identify as most influential on its development in New Zealand?
- Can the intersections between public relations and social marketing support social change and clarify academic deliberations on inter-disciplinary intersections?
- Can lessons about effective approaches to the wicked problem of indigenous health disadvantages be taken from the New Zealand social marketing experience?

The papers that make up this thesis provide a review of the evolution of social marketing in Aotearoa New Zealand, and an in-depth discussion of the factors, including political, cultural and disciplinary, that influenced the development and decline of social marketing between 1984 and 2017. While there are lessons to be learned for other jurisdictions, further research is needed to explore whether the experiences and lessons from Aotearoa can be applied more broadly.

The three articles' titles reflect three different research projects relating to the overall topic:

- Learning from practice and politics: The rise and fall of social marketing in Aotearoa New Zealand (1984-2017), published in *Social Marketing Quarterly*
- Soul searching: Public relations, reputation and social marketing in an age of interdisciplinarity, published in *Public Relations Review*
- Decolonizing social marketing: Indigenous knowledge and NZ practitioner experiences (Currently being rewritten for submission).

It is important to note that *Public Relations Review* is an A ranked journal and is considered the top journal in the field (Scopus: Citescore 5.6, #19 on a list of 426 communication journals, 95 percentile). *Social Marketing Quarterly* is one of only two scholarly journals focused on the growing academic research on the function of social

marketing. It is ranked B (Scopus: Citescore 3.2, #79th of 185 Marketing journals, 73rd percentile).

All three papers used content from my interviews with leading experts in New Zealand, however, each publication provides different content and quotes from the same interviewees.

Combining the outcomes of the three research projects the major conclusions related to: (1) the importance of political support for social marketing, (2) the importance of an interdisciplinary approach as evidenced by the influence public relations practice had on shaping the New Zealand approach to social marketing, and (3) the role of indigenous knowledge in shaping social marketing practice. The breadth of practice included in their descriptions of social marketing was immense despite a consistent frustration with the misunderstanding of the discipline within government and among their colleagues

This thesis is presented in seven parts. Chapter One introduces the thesis, its content, context and the themes identified. Chapter Two is an introductory literature review which is extended upon in the following chapters. Chapter Three describes the methodology. Chapters Four, Five and Six present the research articles, together with a brief outline of their publication status. Chapter Seven concludes the discussion and includes limitations and future research projects.

### **Some background**

In one of the first marketing texts to emerge in the COVID era, Kotler et al. (2020) describe *The Genesis of Human-to-Human Marketing*. This new approach to marketing emerges as around the world we recognise humanity's weaknesses, strengths, challenges and resources as we address a global pandemic, climate change and increasing inequities within

and between nations. Some might say that marketing is beginning to acknowledge the humanity that sits at its heart. Fifty years ago Kotler and Zaltman (1971) also argued for marketing to take a role in acknowledging and improving the human condition, this was the genesis of social marketing.

Fifty years later, misunderstanding of social marketing remains a common occurrence, and the literature has increasingly featured calls for the practice to be promoted better (Deshpande, 2019; Kassirer et al., 2019; Lee, 2020; Santos, 2019). Despite this, scholars have described social marketing as an accepted and effective means of achieving individual and societal change through the use of marketing principles and techniques (Dibb & Carrigan, 2013; Donovan & Henley, 2003; Kassirer et al., 2019; Lee, 2020; Lee & Kotler, 2011; Lefebvre, 2013).

The initial uptake of social marketing, particularly around family planning, hygiene, sanitation and women's health (Donovan & Henley, 2003), was within the developing world during the 1970s. Lee and Kotler's (2011) later review of the first ten years of social marketing application identified a lack of rigour in the application of marketing techniques and principles. More recently, during the 1980s, social marketing began to establish itself within the developed world and the Centers for Disease Control in the United States began to promote the practice (Lee & Kotler, 2011). Australia began to apply marketing concepts across a range of public health areas (Donovan & Henley, 2003) at the same time. It is evident that over the last 50 years social marketing's historic roots has expanded in its range, its geographical reach, and its academic methods (Cheng et al., 2009; French et al., 2010; Merritt et al., 2017; Santos, 2019; Truss et al., 2010).

Across the globe, a growing interest in social marketing has resulted in the establishment of social marketing conferences, academic journals and research centres and social marketing is being recognised as a solution to wicked social problems (Dibb & Carrigan, 2013; Kassirer et al., 2019; Lefebvre, 2013; Veríssimo, 2020).

2021 marks 50 years since Kotler and Zaltman's seminal paper and an initial definition for social marketing. Huge energies have been invested into defining the practice since this time. Dann (2010), for example, identified 45 different definitions. For Dann, the revised definitions do not account for social marketing aimed at social structures or political decision-makers, and thus ignore much of the focus of contemporary social marketing. To address this, he proposed his own definition as "the adaptation and adoption of commercial marketing activities, institutions and processes as a means to induce behavioural change in a targeted audience on a temporary or permanent basis to achieve a social goal" (Dann, 2010, p. 151). He bases this on the updated definitions of marketing developed by the American Marketing Association and the UK Chartered Institute of Marketing. However, the emergence of professional associations for social marketing has since seen the development of a consensus definition adopted by social marketers across the globe. This thesis is using the following recognised definition:

Social Marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviour that benefit individuals and communities for the greater social good.

Social Marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform the delivery of competition sensitive and segmented social change programmes that are



effective, efficient, equitable and sustainable (Carvalho et al., 2017; International Social Marketing Association, 2013).

### **The New Zealand Experience**

The conscious adoption of social marketing in New Zealand can be dated to 1999 when the Health Sponsorship Council (HSC) as a crown entity, began to describe itself as “a team of Social Marketers who promote health messages” (McDermott Miller, 2001). This was also the year in which information on social marketing first appeared on the HSC website. In 2001, the HSC published *Marketing Social Change* (2001), providing an introduction to social marketing as one of the many social change tools to improve the health of New Zealanders. New Zealand’s social marketers’ roots emerged from the public relations industry and the intersection between communication management and social marketing was shaped by this historical development.

My own connection with social marketing in Aotearoa goes back to this time. In early 2002, I attended a social marketing workshop led by Hoani Lambert at the HSC. This ‘new’ approach to improving health grabbed my imagination and in the years that followed I would work in social marketing within government, non-profit and commercial agencies.

Eighteen years ago, social marketers Bridges and Farland noted that “social marketing is not an area that is well-researched in New Zealand” (2003, p. 5). Since they made that statement as the field was finding its feet in the country and the first national conference was about to be held, one might expect that the field would be better served today. It would be reasonable for example to expect Government agencies to have built on established practices, universities to have well established research and teaching programmes, and practitioner networks to be flourishing. That is indeed the case in many of the countries New Zealand

uses for meaningful comparisons, and for policy and practice inspiration. And yet New Zealand has not held a social marketing conference in more than a decade, social marketing units have not been established within the universities (although most New Zealand universities now deliver a social marketing paper) and many government departments have only begun to re-explore social marketing in the last few years. It is relevant to add that in 2012 the Health Sponsorship Council was replaced by a different crown entity, the Health Promotion Agency, that abandoned the Council's commitment to the social marketing sector.

Social marketing campaigns in Aotearoa have often had a significant focus on Māori, the indigenous peoples. For example: No Rubba No Hubba Hubba (sexual health), National Cervical Screening Programme, Breastscreen Aotearoa, It's About Whānau (smoking), Healthy Eating Healthy Action, Breastfeeding NZ, Ghost Chips (road safety), the list goes on. The creative executions for these campaigns all involved Māori talent, and often Māori language. The rationale for a focus on Māori is clear. Māori are less advantaged than non-Māori New Zealanders over a number of reported factors and while there have been improvements over time, these improvements have been more marked for non-Māori New Zealanders resulting in greater inequity (Ministry of Health, 2019). Māori are also disproportionately over represented in socio-economically deprived neighbourhoods (The Waitangi Tribunal, 2019) with almost one quarter of Māori living in the most deprived decile (Stats NZ, 2018). The challenge of addressing inequity for Māori has been an ongoing issue for New Zealand (Health Quality & Safety Commission, 2019; The Waitangi Tribunal, 2019). While there have been improvements over time (lung cancer mortality, sudden unexpected death in infancy and tuberculosis), there have also been areas where inequity has increased due to more marked improvement for non-Māori than Māori (for example, Māori were 2.6 times more likely to smoke daily than non-Māori in 2011/12 and 3 times more likely

to smoke in 2015/16) (Ministry of Health, 2019b). While improvements for Māori are present, inequity in health outcomes have increased.

Significant investment in social marketing programmes aimed at Māori do not appear to have led to corresponding improvements in health, noting that the focus and development of those programmes has been led from a Western, English-speaking perspective. As Dibb et al. (2013) suggest, health oriented social marketing can contribute to empowerment, equity, inclusion, respect and social justice. How then does social marketing contribute to addressing the ‘wicked problem’ of indigenous inequities? Kassirer et al. (2019) note that the literature and social marketing associations have called for diversity of culture and ideology within the field. And while indigenous knowledge is playing an increasing role in health promotion and other areas of health (Durie, 1999, 2019; Health and Disability System Review, 2020; International Union of Health Promotion and Education, 2019a, 2019b; Ratima, 2010), there is little evidence of indigenous knowledge shaping social marketing practice and models. Social marketing has not achieved its full potential for indigenous peoples (Kubacki & Szablewska, 2017; Reece, 2020).

Despite flourishing in Aotearoa New Zealand in the early 2000s, the profile of social marketing has declined significantly in the last decade. Terminology such as social entrepreneurship, design thinking, social innovation and others have monopolised the space despite a smaller focus. Social marketing is not unique in its focus on social good, indeed the aligned discipline of public relations has a history of similar aims (Cutlip, 1994).

Social marketing in Aotearoa has struggled to find a natural location within the academy – my own PhD application highlighted this for me. As a magpie profession drawing on the social sciences, marketing, communication and health theories, interdisciplinarity sits

at the heart of social marketing. Indeed, my own academic career echoes this with studies in indigenous development, public health, marketing, management, communication, social enterprise, community work and education. Positioning social marketing within the academy in Aotearoa New Zealand is challenging, although this experience is shared by other disciplines. McKie and Willis (2012), for example, identify marketing's efforts to subsume public relations confirming Kotler's attempts to broaden marketing (Dibb & Carrigan, 2013). In a small nation like New Zealand, with limited resourcing and scale within its tertiary education institutions (likely more so in the COVID-19 era), creating an academic community and hub for social marketing has not proven easy. Indeed, social marketing appears to be the unwanted offspring of several parents!

I have now had the privilege of being part of the New Zealand social marketing community for two decades. I have worked with the practitioners that shaped this small nation's adoption of the practice, and I was witness to the decline of social marketing under the National Government. I was also conscious that many of the early practitioners had changed career, with several eyeing retirement in the next few years (at least one has retired during the course of my PhD journey). I wanted to understand how expert social marketing practitioners viewed the emergence and role of social marketing in New Zealand and the relevance of its experience to the world.

### **So why me? Who am I?**

Aotearoa New Zealand is a bicultural nation. In interactions that acknowledge this, the question 'ko wai au – who am I?' marks the start of any relationship. The answer establishes connections between the different parties, their forebears, the land, the spiritual world and the wider universe. In research, the answer to this question speaks to the ontology,

the epistemology, the methodology, and perhaps most importantly the utility and authenticity of the research. I write from my own time, place and culture (Abu-Lughod, 2012; Foley & Valenzuela, 2005), speaking from my experience. As Bowling (2014) notes, interpretation of events is shaped by what we have been taught and the ideological tenets we accept. My work therefore draws on my identity as a white, gay, cis-gendered Yorkshire man living in Aotearoa and my academic and professional experience in informal education, health promotion, public health, social enterprise, indigenous development and adult teaching.

My career, while diverse, has been built on insight into people and communities and a desire to make a real and sustainable difference in the life of my fellow humans. In many ways, this is an insider approach to research. I am and have been a social marketing practitioner and evaluator. Many of the people I engaged with during this PhD are former, current, and possibly future colleagues. This position as an insider provided greater insight to information and people, enhanced credibility within the practitioner community, and a familiarity with the context, the work and the people. I share the perspectives of McKie & Munshi, (2007) in not “attempting any ‘spurious neutrality’ (Fairclough, 1989, p. 5)”, and their declarations that “investigation of social matters is perfectly compatible with committed and ‘opinionated’ investigators (there are no others!)” and that “being committed does not excuse you from arguing rationally or producing evidence for your statements” (p. 5). I also support their claim that the “life stories of authors are often suppressed in academic books” (p. 5) and follow their call for declarations of “interestedness” in scholarly writing.

I am particularly conscious that, having been personally involved in the stories I have explored, I may bring some bias and, accordingly, have attempted to draw attention to my role and reflect transparently on my perspectives.

My career as a health promoter and community worker took a turn towards social marketing back in 2001 during my first day at work in New Zealand. I reported to the Health Sponsorship Council to learn about Tobacco Control. This was the focus for the new job, and it came with an introduction to social marketing. The field would come to fascinate me as, until this point, I had worked in the two related fields of community development and health promotion. This had made me familiar with the importance of understanding the needs and aspirations of communities (and balancing these with a focus on the social and economic determinants of health); of looking at the local and the global; and of taking a multi-disciplinary approach. All factors that would provide a platform for my journey into social marketing also academically.

Arising from this background, and strengthened by subsequent experiences in New Zealand, I am convinced that social marketing has the potential to strengthen local and national health improvement activity. In addition, I see social marketing as having the capacity to integrate with health promotion and public health action to improve health outcomes and address health inequities. However, while social marketing activity has been taking place in New Zealand since the 1990s, there does not appear to have been any attempt to document the practice at an operational or a strategic level.

During my time in New Zealand (2001 onwards), I have observed how political support for health promotion and social marketing has changed over time. One marker of change can be seen in how the term health promotion does not appear in the New Zealand Health Strategy 2016 but health promotion was referenced several times in the earlier strategy. Significantly for this thesis, the term social marketing does not appear in either strategy. As Griffiths et al. (2009) note, “good health promotion and good social marketing have a shared and consistent core theory and practice base” (p. 269), although both also

suffer from a common tendency “to be misunderstood and undervalued” (p. 269). The lack of research into the development of social marketing in New Zealand, its usefulness, and its successes has meant that growing and defending the discipline is problematic. This was the void that led to this PhD.

### **Research projects**

#### **Learning from practice and politics: The rise and fall of social marketing in Aotearoa New Zealand (1984-2017)**

The published research project presented in chapter Four explores social marketing in NZ from the perspective of 20 social marketing practitioners. The chapter analyses the evolution of social marketing in NZ from 1984 to 2017. It includes an in-depth discussion of the factors, primarily the political factors that influenced the development and decline of the practice during this 33-year time period. The chapter makes a unique contribution to the literature through identifying the impact of the ebb and flow of neoliberal policy on social marketing in NZ. The narrative timeline in the chapter accounts four major politically influenced stages: Foundation (1984-1990); Establishment (1990-1999); Growth (1999-2008); and Decline (2008-2017).

#### **Soul searching: Public relations, reputation and social marketing in an age of interdisciplinarity**

Chapter Five presents a research project that investigated the potential for the development of social marketing based on its intersection with public relations. The chapter identifies the present as the age of interdisciplinarity and the need for the soul-filled disciplines of public relations and social marketing to create social change. The chapter presents three jurisdictional perspectives: (1) Professions, promotional disciplines, and the

fight for good; (2) is social marketing pure soul; and (3) the evolution of social marketing in NZ. We conclude by suggesting that through aligning with public relations, social marketing's position within the academy can be strengthened and the aligned discipline of "social PR" developed, creating more opportunities in terms of social change and employment with soul.

### **Decolonizing social marketing: The challenge of indigenous knowledge and NZ practitioner experiences**

Chapter Six brings together recent developments in the social marketing literature in light of the *Black Lives Matters* movement and increasing efforts to bring indigenous voice, knowledge and influence to social marketing. The research synthesizes the opinions of leading NZ social marketers with key documents to identify support for social marketing to address indigenous health disadvantage. We note a shift in thinking to encompass indigenous knowledge, techniques and worldviews in a broader social marketing that addresses systems and more localised change. This chapter calls for a decolonisation of social marketing concepts, practices and outcomes to create culturally appropriate forms of social marketing. .

This article was submitted to the Journal of Social Marketing and is being reworked into a conceptual essay on social marketing and Māori values following the reviewers' comments to revise and resubmit. The journal editor commented that: "This is an incredibly important topic and guidance offered by reviewers may assist you to place your work at the very forefront in the field where much more work and best practice examples are needed".



### **Concluding thoughts: A platform for the future**

Chapter Seven concludes this thesis with a discussion of limitations and future directions for research. This includes identifying the need to extend the areas explored to other nations and to explore the integration of social marketing with the wider health system.

## **CHAPTER 2: BUILDING THE FOUNDATIONS - SOCIAL MARKETING IN THE LITERATURE**

Social marketing is a distinct discipline within marketing (Lee & Kotler, 2020). It has emerged as a dynamic results-focused discipline that contributes to social improvement (Mckie & Toledano, 2008). The generally accepted description of social marketing identifies it with the application of marketing concepts, tools, and techniques to achieve behavioural and social change. Although, even as the field celebrates the fiftieth anniversary of Kotler and Zaltman's (1971) use of the term "social marketing" in their landmark paper *Social marketing: an approach to planned social change*, there is still considerable discussion of the lack of understanding of social marketing (Cook et al., 2020; Deshpande, 2019; Griffiths et al., 2009; Kassirer et al., 2019a; Lee, 2020). The confusion of what is and is not social marketing arises, according to Tapp et al. (2013) and Gordon (2012), because social marketing is often used by people without marketing backgrounds. In other words, a workforce without a strong understanding of the discipline.

Social marketing is about achieving social change via programmes targeting health behaviour (nutrition, sun-protection, HIV, smoking, drug abuse, alcohol, immunisation); environmental behaviour (littering, recycling, travel, animal welfare); road safety behaviour (seatbelt wearing, drink driving, speed); and social behaviours (discrimination, parenting, family violence, human rights, freedom). Social marketing programmes are usually managed by government or non-profit organisations to promote social causes and the common good rather than products and services (Mckie & Toledano, 2008). In a look back at the first four decades of social marketing, Dibb and Carrigan (2013) reflect on the markers of an established discipline, including professional journals, international conferences, research

centres, a growing number of professional education programmes, and I would add the establishment of several national and international professional associations.

### **What is social marketing?**

Dann (2010) identifies more than 40 definitions of social marketing in his attempt to develop a revised definition following updated definitions of its parent discipline by the United Kingdom *Chartered Institute of Marketing* and the *American Marketing Association*, the leading marketing bodies in the English speaking world. Definitions at this time, including Dann's revised definition lack a focus on social marketing aimed at decision-makers and the social structures they influence thus failing to consider the full scope of social marketing practice today. In their analysis of social marketing definitions, Lee and Kotler (2020) identify common activities:

- (a) Use of formative research
- (b) Audience orientation – understanding the motivations and barriers faced by the various audience subgroups
- (c) Systematic application of marketing principles and techniques
- (d) Behaviour change
- (e) Individual and societal benefit.

However, despite these common themes, social marketing has struggled to define itself for much of the discipline's history. Lee and Kotler (2020) suggest that the “primary beneficiary of the social marketing programme is society” (p. 9) although they align this firmly with individual behaviour change. This focus on the individual can also be seen in other social marketing discussion. For example, the United Kingdom's National Social Marketing Centre describes on its website, social marketing for health “enables consumers to critically interpret mass media messages in order to make informed decisions [and] to gain

greater control over the factors that influence their health” (cited in Crawshaw, 2012, p. 206). This approach assumes that poorer health outcomes can be remedied by better access to information and personal motivation. While this focus on individual responsibility has led to citizens becoming “active participants in their own welfare” (Moor, 2011, p. 304), the impacts of power and social circumstances have been ignored (Gurrieri et al., 2014).

### **Social advertising and other confusions**

The focus on communications and individual responsibility has often resulted in social marketing being equated with advertising and promotion – lacking the mix of activities necessary for effective social marketing (Cheng et al., 2011; Lahtinen et al., 2020). This focus on communication and promotion leads to oversimplified messages that do not address the challenges of people’s lived experience (Gurrieri et al., 2014). This is particularly so for habituated and addictive behaviours (Kennedy, 2016). Tapp et al. (2013) describe this confused approach to social marketing as focused on advertising and promotion with posters, resources, incentives and media (i.e., health education and health communication) in contrast to an experienced marketer’s view of social marketing as a comprehensive and integrated approach to change. Kotler and Roberto (1989) clarified this difference: “social advertisers may be content to work at the informational or attitudinal level” (p.26). Thus, much practice might be considered social advertising rather than social marketing given the lack of focus on the potential breadth of social marketing practice and the resulting behavioural outcomes.

It is not just social advertising that is often confused with social marketing. This confusion extends to other approaches to social change (see Table 1): nudge theory, prevention marketing (Lee & Kotler, 2020), education, social entrepreneurship, social engineering (Deshpande, 2019) and behavioural economics (Deshpande, 2019; Lee & Kotler,

2020). Health promotion might also be added to this list given the close links to social marketing (Griffiths et al., 2008). However, any analysis that excludes these activities might perhaps be seen as purist and at odds with current social marketing thinking. I present the hierarchical model of social marketing later in this chapter. Initially developed by French (2015), this model identifies how these elements might have a place with social marketing – if they are part of an integrated approach based on social marketing concepts and principles – they can be seen as techniques of social marketing.

*Table 1: Examples of alternative approaches to social change*

<b>Social change approach</b>	<b>Description</b>
<b>Behavioural Economics</b>	Psychological framework based on how environmental changes can prompt individual behaviour change.
<b>Communications and Public Relations</b>	A strategic communication practice focused on the relationship between organisations and communities.
<b>Education</b>	An approach to changing attitudes and behaviour through increasing awareness and understanding.
<b>Health Promotion</b>	A multi-layered approach to empowering individuals and communities to take control of their health and the factors that affect this.

<b>Social change approach</b>	<b>Description</b>
<b>Nudge Theory</b>	A tactical approach to making the instigator's chosen behaviour the default option when presenting choices.
<b>Prevention Marketing</b>	A marketing led approach to engaging influencers and key community members in identifying issues and mobilising resources to create change.
<b>Social Advertising</b>	The use of paid mass media messages to provide information and change attitudes.
<b>Social Engineering</b>	A tactical approach to changing environmental factors to prohibit or encourage a desired behaviour
<b>Social Entrepreneurship</b>	An approach to addressing social, cultural and environmental issues through commercial activities.

Addressing the lack of clarity on what constitutes social marketing has led to a reliance on benchmarks (Andreasen, 2002; National Social Marketing Centre, 2010) which has introduced a rigidity to the field and a focus on models that have increasingly been left behind by the commercial world (Gordon, 2012; Peattie & Peattie, 2003; Alan Tapp et al., 2013). For example, across almost fifty years of social marketing publications, Kotler continues to place the 4P marketing mix of product, price, place and promotion as the “major intervention tools” (Lee & Kotler, 2020, p. 7) despite broader approaches to marketing in the

21<sup>st</sup> century. The benchmark criteria frequently used in the literature to judge whether an intervention is or is not social marketing have also included use of the 4P marketing mix as a critical criterion. At social marketing's genesis, Kotler and Zaltman (1971) described the marketing mix as "developing the right *product* backed by the right *promotion* and put in the right *place* at the right *price*" (p.7 ). The concept of the marketing mix was first presented by Neil Borden of the *American Marketing Association* in 1953, although it was not until 1960 that the 4Ps classification was proposed by Jerome McCarthy (Gordon, 2013). Since then, this interpretation of the marketing mix has become common. Much like Kotler's various definitions of social marketing, many scholars focus on the 4P marketing mix as a core element of social marketing (Bridges & Farland, 2003; Hastings, 2007; Hopwood & Merritt, 2011; Lee & Kotler, 2011; Lee & Kotler, 2013; Lefebvre, 2011a; Lefebvre et al., 2001; Alan Tapp et al., 2013). Social marketing benchmarks such as those of the English National Social Marketing Centre (2010), Lee and Kotler (2011), and Andreasen (2006) have also included the 4Ps as an integral part of social marketing. It is as if it is part of the field's DNA.

### **Defining social marketing**

In response to the lack of clarity of what constitutes social marketing, in 2013, the *International Social Marketing Association*, *European Social Marketing Association* and the *American Association of Social Marketing* approved a consensus definition of social marketing:

Social Marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviour that benefit individuals and communities for the greater social good. Social Marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform

the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and sustainable. (International Social Marketing Association, 2013)

This consensus definition is published on the professional association websites. The definition broadens the techniques available to social marketers under the banner of social marketing although this may be the reason for its slow adoption among academics – it does not provide an easy recipe and set of benchmarks for analysing social marketing. In Aotearoa New Zealand, local definitions and descriptions of social marketing began to appear in the early 2000s (Bridges & Farland, 2003; Health Sponsorship Council, 2001). These local definitions appeared to be strongly influenced by public relations thinking – extending the marketing mix to include partnerships and policy (Health Sponsorship Council, 2004). Despite this merging of practices, as McKie and Toledano (2008) identify, public relations and social marketing practitioners and academics have little understanding of each other's fields. This thesis' research project that is reported in Chapter five discusses this lack of clarity by both fields. The project was published in 2019 in *Public Relations Review* under the title Soul searching: Public relations, reputation and social marketing in an age of interdisciplinarity.

Today, more than thirty countries around the globe have used social marketing as an approach to behaviour change (Cheng et al., 2009; Santos, 2019), particularly in the health arena. In the next section, I look back across the fifty years of social marketing practice to explore the life stages of social marketing. Over the last half century, social marketing has moved from a focus on individually mediated change in the early years through to the comprehensive approach to system change outlined in the consensus definition.



## Half a century of practice and research

### The life stages of social marketing: (1) From communication to behaviour change

Kotler has made many arguments to broaden the scope of marketing, beginning with a co-authored article with Levy: *Broadening the Concept of Marketing* (Kotler & Levy, 1969). Kotler and Levy argue that marketing can be applied to people, places and causes. The subsequent broadening of marketing to address social issues has been known as social marketing since Kotler and Zaltman's (1971) paper. However, Kassirer et al. (2019a) identify the use of marketing to address social issues during the 1960s, naming academics and practitioners such as Bloom, Fox, Manoff, Novelli, Levy and others. Lee and Kotler (2020) date the emergence of the practice even earlier when they cite the work of the suffragettes in the United States across the nineteenth and early twentieth century, and scholars such as Donovan and Henley (2003) link social marketing to national propaganda efforts in the United States during the 1940s and later application to a wide range of social issues.

In the 1970s, the early uptake of social marketing practice largely occurred in the developing world around issues such as family planning, hygiene, sanitation and women's health (Donovan & Henley, 2003; Kassirer et al., 2019a). International development organisations such as the United States Agency for International Development and the British Department for International Development commissioned much of this initial activity (French, 2013). Bloom and Novelli's (1981) review of the first decade of practice (1971-1981) identified the fledgling discipline's lack of rigour in the application of marketing techniques and principles. The second decade of practice saw a move into more of the developed world. In 1980, the Centres for Disease Control in the US became a champion for the practice (Lee & Kotler, 2011). At the same time Health Canada established a social

marketing unit (Lagarde, 2015) and Australia began to apply social marketing across a range of issues (Donovan and Henley, 2003). Social marketing would later emerge in Aotearoa New Zealand during the 1990s (McDermott Miller, 2001) and in Europe in the first decade of the 21st Century (Merritt et al., 2017). According to Merritt and colleagues (2017), the UK has been particularly successful in embedding social marketing with the Department of Health establishing the National Social Marketing Centre (NSMC) in 2006.

Kotler has described how social marketing came into its own during the 1990s when scholars and practitioners recognised that the discipline should focus on behaviour not ideas (Dibb & Carrigan, 2013). This was also the period when relatively independent practice around the globe began to coalesce into a single field (Kassirer et al., 2019a). Andreasen (2003) described this period as adolescence. This was the period in which social marketing began to differentiate itself from education and communication approaches, setting its ultimate measure of success as “to generate desirable social behaviours” (Andreasen, 2003, p. 297).

### **The life stages of social marketing: (2) Developing a process**

Kotler suggests that following the shift to a focus on behaviour change, the next key event in the emergence of social marketing practice was the development of a social marketing process (Kotler featured in Dibb & Carrigan, 2013). Kotler suggests that for disciplines to become established they need a process (Smith, 2012) and while that has been a successful tactic for guiding people to his publications and, perhaps, making early social marketing more accessible, it does not address the depth and breadth of today’s practice. Nevertheless, the 10-step process initially presented as the *Social Marketing Planning Primer*

by Kotler *et al.* (2002) has an important place in the establishment of social marketing. The 10 steps they present in developing a strategic social marketing plan are:

- (1) Background, Purpose and Focus
- (2) Situational Analysis
- (3) Target Audiences
- (4) Behavioural Objectives and Goals
- (5) Target Audience Barriers, Benefits, Competition and Influencers
- (6) Positioning Statement
- (7) Marketing Mix
- (8) Monitoring and Evaluation
- (9) Budgets and Funding
- (10) Implementation Plan (Lee & Kotler, 2011).

The benefits of this prescriptive process are particularly clear where social marketing practitioners do not have marketing backgrounds. While this process will be familiar to most commercial marketers, Lee and Kotler (2011) suggest three key differences to the commercial marketing plan: firstly, the priority audiences are selected before the goals and objectives are set; secondly, competition is considered outside of the situational analysis; and thirdly, goals are quantifiable measures within the plan.

Kotler *et al.* (2002) were not alone in their attempts to define social marketing practice, Andreassen (2002) and the UK National Social Marketing Centre (2010) presented

benchmarks which have frequently been used to define what social marketing is and is not in the literature. However, the over-reliance on defined sets of criteria stifles the evolution of social marketing. 21<sup>st</sup> century social marketing needs to inform policy and strategy as well as focus on specific behavioural issues (Hopwood & Merritt, 2011). Indeed, *TheSAGE Handbook of Social Marketing* (Hastings et al., 2011) illustrates the breadth and depth of social marketing practice: social diffusion, social networks, relationship marketing, design thinking, policy-making, advocacy, individual and system level change.

Based on Rogers (2003) Diffusion of Innovation theory (originally published in 1962) Social Diffusion theory has been recognised as a promising approach to health promotion efforts. It concerns the uptake of innovative ideas, behaviours and practices and its use in social marketing focuses on increasing the adoption of healthy behaviours (Lefebvre, 2011b). Social networks identify how the network of people around us and the links between individuals influences behaviour – people learn their behaviours by observing those they are connected to (both online and in real life). Lefebvre (2011b) suggests that social marketing can nurture new linkages of individuals and organisations in order to change behaviour. Marques and Domegan (2011) suggest that relationship marketing provides a new foundation for social marketing. This refers to marketing activities “directed toward establishing, developing and maintaining successful relationships” (p. 45), and thus social marketing that is focused on relationship quality, dialogue and value co-creation in order to create change. Design thinking positions the consumer at the heart of design (thus aligning well with marketing approaches) and involves the user in co-creating solutions. The principles of design thinking focus on generating options and testing solutions with the audience, providing a transformative approach to social marketing. The role of policymaking, advocacy

and systems thinking are more immediately obvious in upstream approaches to social marketing discussed in the next section.

### **The life stages of social marketing: (3) Broadening the focus – the environment, influencers and the individual**

The process and criteria driven approach that marked the second life stage of social marketing does not fit with today's global consensus definition of social marketing (International Social Marketing Association, 2013) and has led to the over reliance on a 4P marketing mix as sitting at the core of social marketing. Other limitations of the second phase of social marketing include biased analyses of issues and a focus on individual rather than environmental factors (Cook et al., 2021). To address these limitations Andreassen proposed three levels of marketing practice (2006) or a multi-layer approach: an upstream focus on decision makers, a midstream focus on influencers and a downstream focus on individuals. Advocates for upstream approaches argued that attempts to influence individual behaviour change via social marketing interventions could not achieve their potential without an effort to influence the system in which individuals live and struggle. Kotler has described this multi-layered approach to social marketing as the beginning of the third stage of social marketing (Dibb & Carrigan, 2013), moving from a focus on individual change to a focus on the system and its role in supporting or maintaining behaviour change.

The focus on social issues and structural change was also evident prior to Andreassen's *Social Marketing in the 21<sup>st</sup> Century* (2006). For example, Donovan and Henley's (2003) definition of social marketing identified the use of the marketing paradigm to influence decision-makers and change environments. More recently, French (2017) identified that achieving individual and social wellbeing through social marketing relies on addressing

social, economic and cultural environments – looking upstream. Social marketing can provide governments with the insights that might enable them to understand the needs and aspirations of increasingly empowered populations (French et al., 2010). Indeed, Gordon (2013) describes upstream social marketing as a practice focused on changing the behaviour of decision-makers to create structural change in order to positively impact on social issues. He notes that while upstream social marketing has been influential in relation to smoking, it has not been employed systematically in other areas and its full potential is yet to be realised.

Although the terminology differs and the focus is on an integrated or strategic social marketing approach, a similar multi-layered approach to social marketing features in the approach advocated by the National Social Marketing Centre (NSMC). Hopwood and Merritt (2011) of the NSMC describe strategic social marketing<sup>2</sup> as consisting of approaches that focus on policy (upstream social marketing), strategy (midstream social marketing), and implementation or operational social marketing (downstream social marketing). That said, whether any of the examples featured in the National Social Marketing Centre's *Big pocket guide: To using social marketing for behaviour change* (Hopwood & Merritt, 2011) can be said to include upstream social marketing is open to debate. Further, as Polonsky (cited in Dibb & Carrigan, 2013) emphasise that the integration of upstream and downstream approaches is often fragmented by government agencies.

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<sup>2</sup> Note, Hopwood and Merritt's (2011) use of strategic social marketing differs from Lee and Kotler's (2011) use of strategic social marketing.

The third stage of social marketing continues to find its feet. As Kennedy (2016, 2017, 2019) identifies, a system-focused approach is well placed to address today's "wicked problems". Social marketing has a role to play in individual change but must also focus on the policy and strategy areas, using citizen insights, and targeting managers, regulators and public servants to improve policy and enable effective intervention (Hoek & Jones, 2011; Kennedy & Parsons, 2019; Kennedy et al., 2018; Kennedy, 2012). As Hoek and Jones (2011) in their paper *Regulation, public health and social marketing: a behaviour change trinity*, have suggested the individual downstream focused approach to social marketing is insufficient. They advocate for an approach that "focuses on policy and regulation, with the aim of altering environments so these support and promote behaviour change" (p. 32). Social marketing thus has a multi-level role to play in today's societies, particularly if we are to avoid victim blaming when addressing complex issues rooted in the determinants of health (Hoek & Jones, 2011).

### **Theories underpinning the practice of social marketing**

While social marketing "lacks a unified theoretical framework" (Cohen & Andrade, 2018, p. 84), recent publications such as Rundle-Thiele et al. (2021) *CBE: A Framework to Guide the Application of Marketing to Behavior Change* and Akbar et al. (2021) *Social marketing: advancing a new planning framework to guide programmes* provide frameworks for integrating behaviour change theory into social marketing planning. They provide more comprehensive theory based approaches to social marketing than earlier frameworks.

There are two recognised sets of theories that underpin social marketing. The first, drawn from marketing, Bagozzi's (1975) exchange theory details how transactions or a series of transactions between two or more parties must benefit all involved. In practice this means

that marketers develop solutions that meet people's needs while achieving organisational objective. The second is the far more expansive set of behaviour change theories.

As Manikam and Russell-Bennett (2016) identify, there is an over reliance on familiar theories which can negatively impact programme design. They describe how selection of theory should follow consumer insights and suggest an approach that identifies previously used theories, evaluates earlier programme successes and then moves into theory selection. The sheer range of behaviour change theories available within the literature means that it is not possible, nor useful, to include them within this thesis. Nevertheless, I summarise some commonly used theories in Table 2.

<b>Theory</b>	<b>Description</b>
Attribution Theory	Attribution theory explores the rationale people have for their own behaviour, it helps people to understand why they act, and the motivations needed to change.
Diffusion of Innovations	Diffusion of innovations theory provides an explanation for how new ideas or new products are adopted across different segments of society.
Goal-setting Theory	Goal-setting theory argues that by setting specific goals, individuals will adapt their behaviour in order to achieve their goals.



<b>Theory</b>	<b>Description</b>
Health Belief Model	The health belief model suggests that an individual's willingness to change is based on barriers, benefits, beliefs and other key factors.
Social Learning Theory	Social learning theory posits that people learn by watching others and that linking observed behaviours to positive outcomes increases uptake.
Theory of Planned Behaviour	The theory of planned behaviour (also known as the theory of reasoned action) proposed that adoption of a behaviour is linked to the attitude and intention.
Transtheoretical Model of Change	The transtheoretical (or stages of change) model identifies that individual go through five main stages – from precontemplation to maintenance – in order to change behaviours.

*Table 2: Commonly used behaviour change theories in social marketing*

The seven theories described above (and theories that derive from them) are common in the social marketing literature. The theoretical focus of the field is largely drawn from downstream social marketing. It is also notable that behaviour change theories have been developed largely within Western, educated, industrialised, rich and democratic societies/cultures (Henrich et al., 2010) and that their application to collectivist and indigenous cultures is problematic.

### **Consolidation of a Profession**

Today social marketing is in use across the globe, particularly in efforts to improve health outcomes (Basil et al., 2019; Cheng et al., 2009; Duhaime et al., 1985; Hay et al., 2020; Hay & James Cook University, 2018; Lagarde, 2015; Veríssimo, 2020). As recognised in the *European Journal of Marketing*'s, special issue *Social marketing: social change* (2013), social marketing is seen as a solution to today's wicked problems (Dibb & Carrigan, 2013). There are scholars who suggest a fourth life stage of social marketing. Kotler, for example, links the digital revolution to this fourth stage. However, adding further techniques to the social marketing tactical toolbox has been part and parcel of the discipline across the last five decades.

By 2019, five professional social marketing associations had been established: The International Social Marketing Association, The Australian Association for Social Marketing, the European Social Marketing Association, the Pacific Northwest Social Marketing Association and the Social Marketing Association of North America (Kassirer et al., 2019a). These associations have emerged from communities of practice around the globe (Kassirer et al., 2019a), pursuing a desire to create a social marketing profession. Indeed, the emergence of these associations is leading to the establishment of core knowledge, skills and professional standards although it is notable that the breadth of the key principles (Tapp et al., 2013) and the international association's openness to all disciplines (Kassirer et al., 2019a) challenges the idea of social marketing as a discipline with specialist knowledge and practices (see Abbott, 2014).

The professional associations have developed in nations with significant social marketing workforces. Small nations like Aotearoa New Zealand are less likely to have the

resources or inclination to develop similar organisations. Indeed, as French (2015b) identifies there is little literature on the development and history of the field as it evolves in multiple ways around the world. This led to the study described in Chapter Four and published in *Social Marketing Quarterly – Learning from Practice and Politics: The Rise and Fall of Social Marketing in Aotearoa New Zealand (1984–2017)*. I set out to understand how social marketing had emerged in Aotearoa New Zealand and the factors that had influenced the practice.

In the next section, I provide background to the nation of Aotearoa New Zealand to allow the reader to understand the context for the research reported in this thesis.

### **Social marketing in Aotearoa – A discipline in context**

My own social marketing practice, and the focus of this thesis, is based in Aotearoa New Zealand. The lack of coverage of social marketing as a field of practice in Aotearoa New Zealand drove me to conduct an investigation on social marketing in this specific and unique society. I identified an emerging interest in how the field has evolved in different countries around the world, and my own experience made me cognisant of the difference in practice, including alignment with the field of public relations, and a focus on indigenous wellbeing. It is important therefore to familiarise the reader with this unique South Pacific nation.

The majority of literature on social marketing in New Zealand focuses on the delivery of specific interventions. This includes articles on anti-smoking ongoing campaign Smokefree/Auahi Kore (Crampton et al., 2011; Grigg et al., 2008; Hoek, 2015; Hoek & Jones, 2011; Muriwai & Glover, 2016), mental health campaign Like Minds Like Mine (Thornicroft et al., 2014), cervical screening (Bethune & Lewis, 2009), physical activity

promotion Push Play (Bauman et al., 2003), Healthy Eating Healthy Action (Henwood, 2007; McLean et al., 2009), anti-family violence campaign It's Not OK (Roguski, 2015), and various papers that were prepared for government departments (Thornley & Marsh, 2010; Thornley & Waa, 2009).

The influences on practice in Aotearoa New Zealand can be linked to the unique features of this nation. The islands now known as Aotearoa New Zealand were first populated around the thirteenth century CE as part of the Polynesian diaspora. Iwi and hapū (tribal groups) trace their ancestry back to the waka (canoes) that travelled here at that time. By the time Europeans began to arrive (in the second half of the 18<sup>th</sup> century), the original discoverers of these islands had settled everywhere. The tangata whenua or people of the land had developed a thriving society with life expectancies comparable to the most privileged 18<sup>th</sup> century societies (Reid et al., 2014). The indigenous society was governed by core beliefs and practices, many of which focused on protecting the health and wellbeing of individuals and tribes (Durie, 1994).

In the period between the first European landings and settlement in New Zealand towards the end of the 18<sup>th</sup> century and the First World War, New Zealand was transformed from an exclusively Māori world into one in which Europeans (Pākehā) were the majority and dominated politically, socially, and economically. The British colonial period started with the signing of Te Tiriti o Waitangi/The Treaty of Waitangi (Te Tiriti). This agreement between the British Crown and many of the tribal chiefs was first signed on 6 February 1840. In 1840 Māori outnumbered non-Māori 35 to one however rapid migration, meant that by the turn of the century, non-Māori outnumbered Māori 10 to one (Pool, 2013). Within 60 years, Te Tiriti had resulted in significant loss of land, language and other resources for Māori. The status of Te Tiriti has varied considerably over time – from a ‘simple nullity’ in 1877

(McHugh, 1991) to forging productive relationships between Māori and other New Zealanders today (Museum of New Zealand Te Papa Tongarewa, n.d.). The Crown has failed to adopt Te Tiriti within the legislative framework of Aotearoa New Zealand however Crown principles have been included. These principles have typically ignored the articles of Te Tiriti, particularly around tino rangatiratanga (unconditional sovereignty of Māori) and the guarantee of tiakina (protection) of Māori by the Crown. Most recently, the Crown's failure to protect the health and wellbeing of Māori has been highlighted in The Waitangi Tribunal's<sup>i</sup> recent report *Hauora: Report on stage one of the health services and outcomes kaupapa inquiry*, "as a population group, Māori have on average the poorest health status of any ethnic group in New Zealand... all parties... including the Crown, consider that the poor state of Māori health outcomes is unacceptable" (The Waitangi Tribunal, 2019, p. 12).

Modern Aotearoa New Zealand is a multicultural country. The nation is a parliamentary democracy and constitutional monarchy. While it is known as an agricultural nation and marketed as a clean, green environment, in fact, 87.2 percent of the population lives in or around the major cities (Stats NZ, 2018). The major ethnic groups in Aotearoa New Zealand are Europeans (70.2%), Māori (16.5%), and Asian (15.1%) (Stats NZ, 2019)<sup>3</sup>. New Zealand ranks well in many comparisons of national performance and New Zealand cities often rank well in global comparisons for quality of life and democratic open society (Organisation for Economic Co-operation and Development, 2016; US News & World

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<sup>3</sup> The Census allows people to select more than one ethnicity. Ethnic population counts sum to more than the total population and proportions sum to more than 100 percent.

Report, 2020). These rankings conceal a truth described as *New Zealand's most shameful secret* (Ainge Roy, 2016). One third of the country's children live in poverty, with Māori children disproportionately featured in this, and Māori are disproportionately represented in the majority of poor health measures (Ministry of Health, 2019). Many health outcomes (e.g., life expectancy, obesity, heart disease, infant mortality, suicide) are poor in comparison to other developed nations (Health Quality & Safety Commission New Zealand, 2019) and social marketing has been one of the mechanisms used by some governments to address these issues.

At the 2018 Census, there were 775,836 people of Māori descent in NZ; this represents 16.5% of the population. Māori are a youthful population when compared to the total population, in 2013, the median age for Māori was 14 years less than the median age for non-Māori (38 years) and Māori aged less than 15 years made up 34 percent of the population (18% for non-Māori) (Ministry of Health, 2019). Māori are less advantaged than non-Māori New Zealanders over a number of reported socioeconomic factors (e.g., household overcrowding, unemployment, completion of secondary school, access to a motor vehicle and home ownership). Māori are also disproportionately over represented in socio-economically deprived neighbourhoods (The Waitangi Tribunal, 2019) with almost one quarter of Māori living in the most deprived decile as calculated by Statistics New Zealand. Urban migration in the second half of the 20<sup>th</sup> century has further disconnected Māori from their traditional resources. Professor Papaarangi Reid has linked the inequality of resource distribution and outcomes to ongoing breaches of Te Tiriti, and the historic impact of trauma and poverty through colonization (The Waitangi Tribunal, 2019). The challenge of addressing these inequities in health and wellbeing for Māori has been an ongoing issue for Aotearoa New Zealand (Health Quality & Safety Commission New Zealand, 2019). While there have been

improvements over time (e.g., lung cancer mortality, sudden unexpected death in infancy and tuberculosis), there have also been areas where inequity has increased due to more marked improvement for non-Māori than Māori (e.g., smoking, cardiovascular disease, female assault and homicide, asthma hospitalization) (Ministry of Health, 2019). While improvements for Māori are present, disparity and inequity have increased. Tackling the inequities in health outcomes requires a social marketing approach that brings together multiple stakeholders, particularly around the broader determinants of health. Social marketing has been part of the Crown's solution to poor Māori health outcomes for at least two decades. The specific needs of Maori is challenging social marketers in New Zealand inspired the thesis research project reported in Chapter Six and titled: *Decolonizing social marketing: Indigenous knowledge and NZ practitioner experiences*.

### **A framework for the future: A hierarchical model of social marketing**

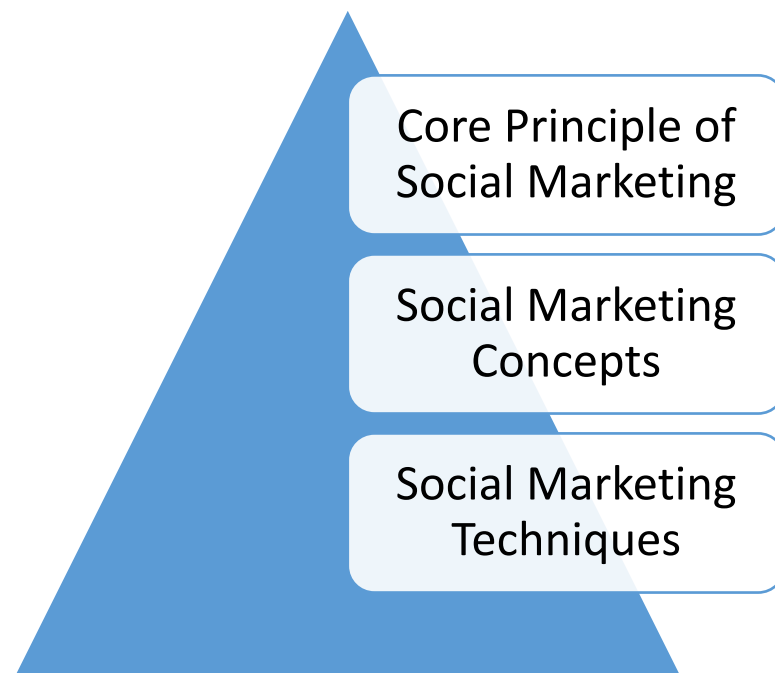
As I established earlier, today's definition of social marketing is broad and inclusive, bringing together diverse approaches to social change within a framework that uses deep understanding of citizens and society to create behaviour change that benefits individuals and societies. Indeed, Hastings (2007) makes the claim that "there is no single theory of social marketing, but its focus on behaviour change leads us naturally to theories of human behaviour" (p. 10). In their international survey of social marketers, Beall et al. (2012) found a strong focus on interpersonal interventions, community-based initiatives and peer group engagement although there was advocacy "for social marketing to play a much more central and strategic role, moving beyond a primary dependence on narrowly-focused social marketing campaigns and projects, so that the customer insight and understanding central to social marketing are used to inform and guide broader policies, strategies and programs" (Beall et al., 2012, p. 111). Lobbyists for commercial marketers argue that consumption of

their products is a matter of individual choice with anything further being decried as nanny state. Imperial Tobacco for example argued that smoking is “a matter of informed adult choice” (Imperial Tobacco New Zealand Limited, 2010). However, as Hoek and Jones (2011) identify, the environment is imbalanced and the dollars spent on encouraging healthy behaviours are far outweighed by the dollars spent to encourage risky behaviours. Social marketers need to be free to adopt the strategic and comprehensive approach of the commercial marketer to address environmental, social and health challenges (French, 2015; French & Apfel, 2014; Kassirer et al., 2019b; Lee & Kotler, 2011; Lefebvre, 2013). Polonsky also identifies the complexity of upstream social marketing and the challenge of coordinating activity across multiple agencies, particularly government organizations with differing responsibilities. Hastings (featured in Dibb & Carrigan, 2013) adds to the challenges faced by upstream social marketers in being outshone by commercial marketers. We need to apply our tools to policy and strategy, to the upstream and the downstream to co-create the greatest impact (Andreasen, 2006; Kassirer et al., 2019b).

As the profession has evolved with the introduction of professional associations, journals, centres of excellence and advanced training opportunities, a model fit for the second fifty years of social marketing has emerged: *A hierarchical model of social marketing* (French & Russell-Bennett, 2015). French and Russell-Bennett (2015) identify that definitions had been used to establish criteria for practice although these criteria are a mix of principles, concepts and technique. The hierarchical model of social marketing presented by French & Russell-Bennett (2015), French (2017) and further evolved by the professional associations (Carvalho et al., 2017) provides a framework for a social marketing that can address the wicked problems across the globe today. The framework (Figure 1) identifies a core principle of social marketing, core concepts that support that principle and then a cluster



of techniques that make up social marketing practice (French & Russell-Bennett, 2015) although the version of the model presented by Carvalho et al. does not include techniques – merging French and Russell-Bennett’s techniques with the core concepts



*Figure 1: The hierarchical model of social marketing (adapted from French & Russell-Bennett, 2015)*

This framework effectively moves social marketing thinking on from the narrow view of the marketing mix and individual behaviour change to a multi-level social marketing addressing the big picture.

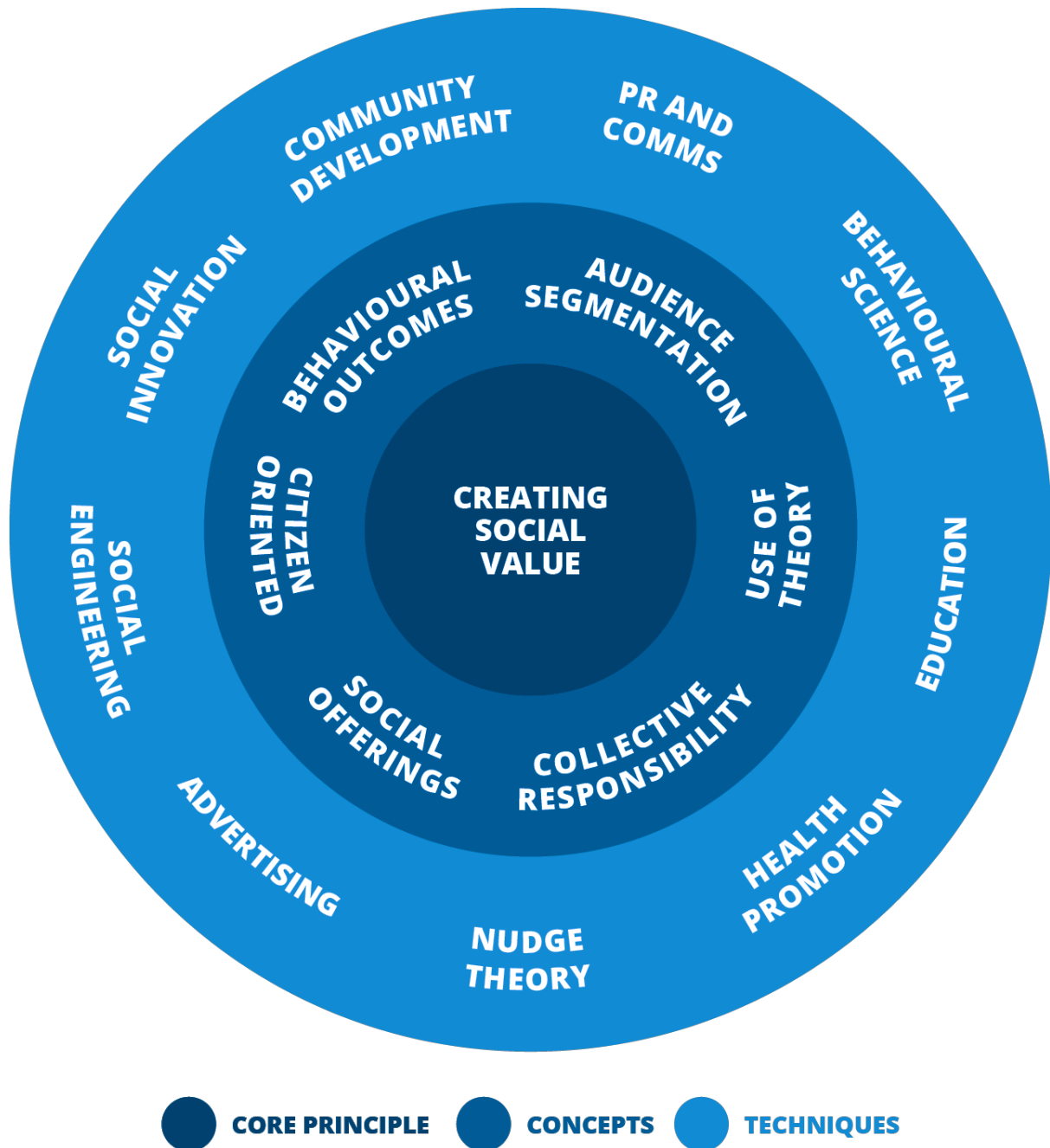


Figure 2: The Core Principle, Concepts and Techniques of Social Marketing (adapted from French & Russell-Bennett, 2015; Carvalho et al., 2017)

This new mix of principles, concepts and techniques acknowledges the increasingly upstream focus of social marketing and the breadth of techniques used by social marketers today. Responding to calls from academics such as Hoek and Jones (2011) for an approach

that “focuses on policy and regulation, with the aim of altering environments so these support and promote behaviour change” (p. 32). Many researchers have identified that approaches that include a more supportive social and physical environment have greater impact (Cheng et al., 2011; Hoek & Jones, 2011; Kennedy et al., 2018). The future for effective social marketing must thus do more than focus on the individual. The more comprehensive focus of the hierarchical model fits well with other approaches to improving outcomes such as behavioural economics, communications and public relations, education, health promotion, nudge theory, prevention marketing, social advertising, social engineering and social entrepreneurship. French and Russell-Bennett’s model allows for social marketing principles and concepts to inform an approach that makes use of a wide range of proven tools within an evidence-based strategic framework.

## **Conclusion**

The thesis is analysing the experience of social marketing in New Zealand. In the literature chapter I position my co-published articles in the context of former and current definitions of social marketing and provide an overview of the relatively young profession’s historic roots dating back at least half a century. Social marketing’s range, reach, definitions, and methods have expanded considerably since the early days. In this chapter, I have provided an account of the emergence of social marketing as an approach to social change. I introduced the professional associations’ consensus definition for social marketing; the definition used in the papers which make up chapters four, five and six of this thesis. I provided an account of the development of the field from 1971 to today across three life stages: stage one confirmed a focus on individual behaviour change, stage two saw the development of processes and frameworks for individually focused behaviour change, and stage three saw social marketing move from a downstream focus on individuals to embrace

practices aimed at system, environmental and political change. In addition, the literature review introduces major features of the nation of Aotearoa New Zealand to provide the context for my investigation of the specific experience of New Zealand's social marketers. The articles that consist this thesis exposed, for the first time, this experience and contributed to the growing literature on social marketing in different parts of the world. The scholarly literature and documents overviewed in the literature review chapter were selected by their relevance to the three articles in chapters four, five, and six.

### **CHAPTER 3: METHODOLOGICAL JOURNEY**

This chapter describes the methodological journey I undertook during my PhD research and thesis writing. Chapters four to six provide the three publications that report about my different studies and include a detailed description of the method used for each investigation. In this introductory section, I explain my initial motivations for pursuing my PhD journey and provide a broader description of my personal experience and observations across my career that inspired my research. My career path that continues today encompasses diverse areas of expertise such as sustainability, health, injury prevention, family violence, financial behaviour, social cohesiveness and biosecurity.

#### **Starting the journey**

The term ‘research’ carries significant baggage in communities, particularly for indigenous groups (Denzin & Lincoln, 2005; Smith, 1999). Research is often seen as a tool of the powerful. I therefore use the term ‘inquiry’ to describe this journey. My preferred approach to inquiry is participatory, working alongside communities. However, at the genesis of this inquiry, the social marketing community was substantially depleted, and I was living far from the bases of potential co-inquirers. whilst my initial focus was on a participatory approach to research, the pragmatist in me was forced to consider another option – Appreciative Inquiry.

Knowledge is both a social experience and a social product. While it may be possible to conduct objective science within the realms of the natural and physical sciences where there is a world of discrete objects independent of the researcher, the same is not true of the social sciences (Marsh & Furlong, 2010; Vromen, 2010). As Guba and Lincoln (2005) identify, realities are local and specific, constructed by people. My approach to inquiry is

qualitative, looking to explore how we construct meanings and interpret the world around us. As Anderson (2006) notes, this process of interpretation can transform inquirers' understanding of the area and their own experiences. It is through working together to explore the situation and our interpretation of it that we are able to learn, to better understand our needs and develop appropriate solutions. Other scholars emphasise that the inquirer is involved in the social situation under investigation, and s/he contributes directly to the perception of the phenomenon in wider society (Della Porta & Keating, 2008; Stringer, 2013).

Every inquirer must justify the approach taken and situate this within the discipline they work within (Crotty, 1998; Della Porta & Keating, 2008; Marsh & Furlong, 2010). Inquiry cannot be neutral, it will either support or question social forces, it can either benefit or harm the community (New Paradigm Research Group, 2011). I accept that inquiry for the sake of inquiry has little value, as Vromen (2010) identifies, inquiry must attend to the problems that matter, to lives, values and power relationships. I have taken the approach that the design of this inquiry must be both flexible and pragmatic. I seek insight rather than the whole truth; practical knowledge that will benefit the social marketing community and wider Aotearoa New Zealand. My focus is on connecting inquiry to action and creating social change (Guba & Lincoln, 2005).

As Muncey (2010) notes, no-one lives in a disconnected world, we [appear to] live in a particular point in time, in a specific geographic space, surrounded by a fluid group of people. Relationships sit at the heart of everything we do, and these relationships need to be considered in any inquiry. My life is bounded and enriched by my relationships with those around me, my interests are shaped by these relationships and my experiences and it is these that shape my involvement in this inquiry. In my work and my writing, I communicate my

gender, ethnicity, spirituality, age, sexual identity, migration status and other factors.

Throughout this inquiry, I am visible and my voice heard along with other voices and an analysis of social, cultural and political experiences for “every view is a view from somewhere and every act of speaking from somewhere” (Abu-Lughod, 1991, p. 141).

### **Being Pragmatic**

As I acknowledged earlier, developing this inquiry has been an exercise in pragmatism. Pragmatists acknowledge that “there is no way that any human action can ever be separated from past experiences and the beliefs that have arisen from those experiences” (Morgan, 2014, p. 26). Pragmatists do not focus on reality but rather on the power of experience and the outcomes of action. The key question to consider is what difference this choice of action will make over another choice. Within a pragmatic approach, actions cannot be separated from context. My beliefs and experiences affect the approaches I take and whichever choices of approach I use I must create effective links between these activities. pragmatism shaped my approach though consideration of ontology and epistemology underpinned the inquiry, the design, method, and final conclusions/findings (Crotty, 1998; Marsh & Furlong, 2010),.

I chose a qualitative approach to the empirical part of the study based on interviews with 20 social marketing experts in New Zealand. The small size of the social marketing community in Aotearoa New Zealand and a focus on providing results that might add value to my professional community made this a clear choice. This has led me to an Appreciative Inquiry approach. This approach allowed for meaningful descriptive and qualitative analysis of interview content (Cooperrider, 2008). The interviews thus focused on knowledge-

producing dialogue around “strengths, successes, values, hopes and dreams” (Whitney & Trosten-Bloom, 2010, p. 1).

My goal throughout my PhD journey has been to co-create knowledge that would be of value to social marketing academics and practitioners. The foundations for this inquiry are the experience and knowledge of local practitioners and the global academy. The inquiry is thus an emergent approach built around personal narratives. This is an insider approach to research. In the next section, I position myself within the inquiry.

### **Positioning Myself**

Aotearoa New Zealand is a bicultural nation. In interactions that acknowledge this, the question ‘ko wai au – who am I?’ marks the start of any relationship. The answer establishes connections between the different parties, their forebears, the land, the spiritual world and the wider universe. The answer to this question speaks to the ontology, the epistemology, the methodology, and perhaps most importantly the utility and authenticity of the inquiry. I write from my own time, place and culture (Abu-Lughod, 2012; Foley & Valenzuela, 2005), speaking from my experience. As Bowling (2014) notes, interpretation of events is shaped by what we have been taught and the ideological tenets we accept. My work therefore draws on my identity as a white, gay, cis-gendered Yorkshire man living in Aotearoa and my academic and professional experience in marketing, communications, informal education, health promotion, public health, social enterprise, Māori development and adult teaching.

My interest in social marketing and other approaches to social change comes from my own experience. I am same-sex attracted. I live in a world where I must ‘come out’ on a daily basis (Adams, 2012). I have experienced homophobia, including my own internalised issues,



and I am forced to challenge heteronormative assumptions whenever I meet someone new. Indeed, my early career includes establishing an HIV/AIDS support organization in a city whose elected representatives denied the presence of gay men (1991-1993), being employed in roles deemed illegal because of their focus on supporting young gay people (Gillian, 2003) (2000-2001) and counselling people who felt continually oppressed by their family and neighbours (1999-2000). This experience often aligns me with marginalised groups, such as women, indigenous peoples and young people, as we challenge the norms of the society we live within. These groups have been particularly targeted by social marketing in Aotearoa and I am conscious that this can be stigmatising. I am particularly conscious of the emancipation of my own mind in addressing internalized homophobia. This has led me to question social norms and the unfairness I see in the world around me. As an educated, white, cis-gendered, middle aged male in Aotearoa, I am aware of the advantages I have and my responsibility to use this to create change. as a discipline social marketing is trying to achieve social change and thus aligns with my personal values and commitments. Although as Alvesson and Sköldberg (2009) identify, it is difficult to address the assumptions and blind spots within my own frames of reference.

My career, while diverse, has been built on insight into people and communities and a desire to make a real and sustainable difference in the life of my fellow humans. I am and have been a social marketing practitioner and evaluator. Many of the people I engaged with during this PhD are former, current, and possibly future colleagues. This position as an insider provided greater insight to information and people, enhanced credibility within the practitioner community, and a familiarity with the context, the work and the people. I am particularly conscious that, having been personally involved in the stories I have explored, I

may bring some bias and, accordingly, have attempted to draw attention to my role and reflect transparently on my perspectives in the following chapters.

Our ways of knowing are shaped by our history, they change over time (Tandon, 2011). Marshall (1999) describes inquiry as part of everyday life while also being an academic exercise. I am therefore visible within this inquiry and any analysis of social, cultural and political experience is from my perspective (Abu-Lughod, 2012; Ellis et al., 2011).

## **Developing Method**

### **Research Question**

My inquiry began with a focus on documenting the evolution of social marketing in Aotearoa New Zealand with a view to informing, improving, and justifying its future. The initial research question was “What can the social marketing discipline learn from the unique experience of social marketers in Aotearoa New Zealand?” The supplementary research questions that evolved from this are:

- What are the factors that practitioners of social marketing identify as most influential on its development in NZ?
- Can the intersections between public relations and social marketing support social change and clarify academic deliberations on inter-disciplinary intersections?
- Can lessons about effective approaches to the wicked problem of indigenous health disadvantages be taken from the NZ social marketing experience?

Exploring these questions makes up the next three chapters of this thesis.

### **Selecting participants**

This thesis is based on findings from semi-structured face-to-face interviews with 20 experienced social marketers. I selected interviewees from former and current practitioners who could provide expert opinion and had relevant professional experiences to share. Participants were selected based on them having extensive involvement with social marketing and most had at least ten years social marketing experience, often across multiple agencies.

The small convenience sample is representative of the small field within Aotearoa New Zealand. Invitations to participate were based on my knowledge of the field and suggestions from participants. Informants included senior managers, consultants, academics and practitioners from the government, non-profit and for-profit sectors. All participants had held social marketing related roles in multiple agencies, many working across these different sectors. The interviewees were mostly Pākehā (descendants of European colonial settlers), one quarter identified as New Zealand Māori; seven were male and 13 were female. The enthusiastic participation of interviewees across the range of questions suggested that they were keen to share their experiences. Although the precarious nature of the discipline meant that several had switched focus all had worked on significant social marketing programmes over periods of at least five years.

### **Approach**

Taking an Appreciative Inquiry approach, I asked interviewees to reflect on their beginnings in the field, their career and their views on the key factors and stages in influencing the evolution of social marketing in Aotearoa New Zealand. I later used relevant documents from government agencies and the media to validate stories, confirm timelines and check that the information was accurate. Thus, I was able to investigate significant stages

in the evolution of social marketing, and to analyse both enablers and barriers to its development. The use of Appreciative Inquiry encouraged reflective responses from participants and opened the space for them to imagine the future of social marketing, including their hopes, dreams and passions for the work in Aotearoa New Zealand. Each interview took between one and two hours. They were held in locations deemed appropriate by participants. This included cafes, workplaces and via video/phone. Eleven interviews were in-person and nine via video/phone. I conducted the interviews between April and June 2019 and later transcribed the content.

The Appreciative Inquiry approach encouraged meaningful descriptive and qualitative analysis. I grounded the interviews in affirmation with a focus on knowledge-producing dialogue around “strengths, successes, values, hopes and dreams” (Whitney et al., 2003, p. 1). In practice, I found this not only encouraged reflective responses but also opened up space for what might be (Whitney et al., 2003) through their personal stories of what worked and what might be better, focusing on their hopes, dreams and passions for social marketing in Aotearoa New Zealand. All interviews followed the same guidelines. Participants were introduced to Appreciative Inquiry as a strengths-based and positive-focused research method. In line with Brinkmann’s (2017) observations, I found that the interview format allowed follow-up discussion on the areas that participants saw as important.

### **Analysis**

After the interviews, I undertook a thematic analysis of the content using NVivo. In line with Peräkylä and Ruusuvuori (2018), the approach to analysing the interview texts was informal and thematic, using open coding techniques. This approach enabled me to identify

the themes which led to the three articles replicated in the next three chapters. I have included the voices of interviewees and others throughout this thesis for as Guba and Lincoln (2005) identify, these voices bring unique perspectives and variations. I have also integrated data from my own experience, government reports, grey and academic literature to supplement the interview data, confirm dates and other factors.

### **Ethics**

The research proposal was approved by the ethics committee of the University of Waikato prior to data collection. The committee considered the interviews guideline and all the forms I prepared to ensure that interviewees would be fully informed about the project and agree to be interviewed.

Powell (2012) identifies that ethical inquiry should consider informed consent, confidentiality, the avoidance of harm, respect for information and a commitment to honesty. Given the small size of the New Zealand social marketing community, I was particularly conscious of the need to protect privacy (Della Porta & Keating, 2008). I therefore invited participants to review the transcripts and how they should be identified within this thesis. All participants were offered the option to have their responses anonymized. Ten interviewees chose to have their responses anonymized. They are referred to by number within the findings chapters (4-6).

### **Summary**

In this chapter, I outlined the journey I took to selecting an Appreciative Inquiry approach. This was rooted in pragmatism, a focus on the power of experience and the outcomes that come from this. I positioned myself, and my background, as motivators for the inquiry and influences on the approach. This thesis is based on semi-structured Appreciative Inquiry

interviews with 20 New Zealand social marketing leaders, in the following chapters, I explore the evolution of social marketing in the unique nation of Aotearoa New Zealand.

## CHAPTER 4: LEARNING FROM PRACTICE AND POLITICS: THE RISE AND FALL OF SOCIAL MARKETING IN AOTEAROA NEW ZEALAND (1984–2017)

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### Abstract

**Background:** This article is the first to explore the emergence and evolution of social marketing as a professional practice in Aotearoa New Zealand<sup>4</sup> (NZ).

**Focus of the Article:** The article identifies key political factors enabling the emergence, and causing the decline, of social marketing in NZ.

**Research Question:** What are the factors that practitioners of social marketing identify as most influential on its development in NZ?

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<sup>4</sup> We use Aotearoa New Zealand in recognition of the two groups that call these islands home: tangata whenua – the indigenous peoples, commonly referred to as Māori – and tangata tiriti – the peoples for whom Te Tiriti o Waitangi (New Zealand's founding document, the Treaty of Waitangi) established their right to live here. We do this to recognize the two cultures that formed this nation and the challenges and strengths this has created. Any reference to NZ should be seen as a recognition of Aotearoa and New Zealand.

**Importance to the Social Marketing Field:** The article makes a unique contribution to the growing literature on the history of social marketing in different jurisdictions by providing the first account of how social marketing evolved in NZ and by identifying the crucial role of political factors.

**Methods:** The research is based on appreciative inquiry-based interviews with 20 experienced social marketers and a review of key documents. Because the field in NZ is small, it was possible to interview almost all of the leading figures.

**Results:** This study constructs a timeline of significant political impacts on social marketing in NZ and identifies neoliberal approaches as key. Initially, neoliberalism enabled the growth of social marketing due to its emphasis on individual responsibility for health. Later, a neoliberal agenda helped disestablish the discipline due to social marketing shifting focus from downstream to upstream economic, political and social factors.

**Recommendations for Research or Practice:** This research concludes that to sustain the legitimacy of their field, social marketers need to produce ongoing evidence-based communication of their effectiveness and responsibility and be less dependent on government funding. It also suggests the continuing enlargement of specifically situated studies of the different evolutions of social marketing in different places to better map commonalities and contrasts.

**Limitations:** The study is limited to social marketing in NZ and would be strengthened by comparative studies of social marketing within other cultures and political systems during particular historical periods. While mainly exploring NZ social marketers' experience from their own point of view, it could be broadened to include other perspectives.



## Introduction

*Titiro Whakamuri, Kōkiri Whakamua – Have Regard for What Came Before to Move Ahead*

The above whakataukāki, a proverb of the indigenous people of Aotearoa New Zealand<sup>1</sup> (NZ), is one of many Māori sayings that focuses on the importance of understanding the past to be effective in the future. This article contends that social marketing has been slow to engage with this view of the importance of understanding the past with relatively little investigation of the evolution of social marketing in general (Dibb & Carrigan, 2013; French, 2015; Kassirer et al., 2019; Merritt et al., 2017). As Deshpande (2019) noted, “the social marketing profession fails to adequately document experiences” (p. 232) and as a result lessons are not shared with other practitioners. This article documents and analyzes the history and specific social marketing experiences in the remote but interconnected society of NZ as important in itself and as a contribution of relevance to the discipline and to practitioners of social marketing in other parts of the globe.

Kassirer et al. (2019) observe that the discipline and the associations who advocate for social marketing would benefit from increased cultural, geographical and ideological diversity. This article addresses this need by adding input from NZ to the growing histories of social marketing. It notes the impact of political agendas, especially neoliberalism – broadly defined as market-oriented reform policies characterized by free market trade, deregulation, and the shift away from state welfare provision. It identifies how, initially, a neoliberal focus on individual accountability and the associated reduction in state expenditure acted as a driver for the uptake of social marketing that targeted individual behavior change. Years later, neoliberals acted to disestablish the discipline due to social marketing shifting focus

away from the downstream “neoliberal approach that puts the blame on individuals and ignores the effect of the wider environment on behavior” (French & Gordon, 2015, p. 44) to upstream economic, political and social factors. Neoliberals opposed this shift as part of an interventionist and infantilizing “nanny state.”

This article draws on the experience of 20 established NZ social marketers who through in-depth interviews identified the factors that have shaped local practice. These social marketers hold and have held diverse roles in top positions within the non-profit, for-profit and government sectors, serving as policy advisors and consultants in government agencies and ministers’ offices. Using an appreciative inquiry approach, the first author invited participants to reflect on their careers in social marketing and to discuss the key factors influencing the evolution of social marketing in NZ. In addition, the study uses relevant organizational material, policy statements, and political documents. It follows Beall et al.’s (2012) suggestion that social marketers need to share their knowledge and experience to enable the discipline to continue to evolve effectively.

### **Literature Review**

Social marketing is increasingly recognized as a mature discipline with established university programs, research journals, and regional associations (Dibb & Carrigan, 2013; Kassirer et al., 2019). Evidence of the effectiveness of its practices and its use of theory to guide them is growing (Deshpande, 2019). Recent research provides evidence on the evolution of social marketing in such different jurisdictions as Canada, Europe, and the Caribbean (Lagarde, 2015; Merritt et al., 2017; White, 2018). None of these related to the experience in NZ, or to the impact of political factors on the development of social marketing. This article addresses this gap.

Social marketing has evolved considerably since Kotler and Zaltman (1971) first coined the term. It has expanded from its original focus on “bad behavior change” (Andreasen, 2005, p. vii) which is commonly referred to as downstream social marketing, into an upstream approach that focuses on social changes (Dibb & Carrigan, 2013; Gordon, 2013). The downstream approach, which assumes that poorer health outcomes can be remedied by better access to information and personal motivation is associated with the neoliberal construction of individual responsibility that has led to the creation of significant inequalities (Collins et al., 2016; Schrecker, 2016; Smith et al., 2016). External criticism of social marketing has identified its downstream approach as “a neoliberal approach that puts the blame on individuals and ignores the effect of the wider environment on behavior” (French & Gordon, 2015, p. 44). Social marketing’s earlier emphasis on changing individuals’ behavior aligns with neoliberal ideology advocating for a reduction in government control, taxation, and expenses.

### **Political Contexts**

The wellbeing of populations is a government concern and responsibility. As a result, social marketing links to governments not just in aiming to influence policies that promote the common good and support social change but also in developing services that meet citizens’ needs. For more than 25 years, academics and practitioners – see Andreasen (1995), Deshpande (2019), Wood (2012) and Lee (2020) – have identified the importance of political support to social marketing.

This article illustrates the nature of this relationship by setting out how government neoliberalist policies first enabled and then disabled social marketing in NZ. For neoliberals the power of the free market and the principle of free choice are major drivers of social order

and the role of government should be limited (Collins et al., 2016; Schrecker, 2016). This non-interventionist tendency runs counter to social marketing commitments to interventions. In fact, social marketing scholarship criticizes neoliberal “everybody for themselves” mentality and calls to replace it with a social progressive approach (French & Gordon, 2015).

Nevertheless, when they focus on downstream activities rather than government responsibilities for health and wellbeing, neoliberal values can support specific social marketing programs that focus on individual behavior change. On the other hand, governments following a neoliberal agenda delegitimize social marketing as a form of thought control and paternalistic nudging or “nanny state” (French, 2017). Indeed, this “nanny state” moniker is frequently used to deride governments that attempt to address inequalities (Hoek, 2015; Jochelson, 2006) and to criticize social marketing engagement with wider social detriments of health. Crampton et al. (2011) related to this challenge as finding a balance between individual freedom and population health in the context of government interventions and efforts to influence individuals’ behavior.

### **Social Marketing and Social Advertising**

Because our research findings identified different practices of social marketing vs. social advertising in different periods it is important to clarify this difference. The confusion of what is and is not social marketing arises, according to Tapp et al. (2013) and Gordon (2012), because social marketing is often used by people without marketing backgrounds. This has often resulted in social marketing being equated with advertising and promotion – lacking the mix of activities necessary for effective social marketing (Cheng et al., 2011). Tapp et al. (2013) describe this confused approach to social marketing as focused on advertising and promotion with posters, resources, incentives and media (i.e., health

education and health communication) in contrast to an experienced marketer's view of social marketing as a process focused on consumer insights, and considering policy change, stakeholder engagement, exchange, the marketing insight, and community action.

### **Research Question**

What are the factors that New Zealand practitioners of social marketing identify as most influential on the practice's development?

### **Method**

This article is based on findings from semi-structured interviews with 20 experienced social marketers in New Zealand. We selected interviewees from former and current practitioners who could provide expert opinion and had relevant professional experiences to share. The small size of this convenience sampling is representative of a relatively small professional industry. The practitioners included consultants, academics, and practitioners from the government, non-profit and for-profit sectors. Due to the authors' ethical commitment to interviewees who wished to stay anonymous, and the smallness of the sector in NZ, further details about the interviewees' specific professional background are not provided as it might lead to their identity being discovered.

Invitations to participate were based on the first author's expert knowledge of the social marketing field and suggestions from participants. The interviewees were mostly NZ European, one quarter identified as NZ Māori; seven were male and 13 were female. All participants were offered the option to have their responses anonymized. Ten interviewees chose to have their responses anonymized; they are referred to by number within this article.

The first author of this article conducted the interviews following the university's ethical approval in 2019. In line with Peräkylä and Ruusuvuori (2018), the approach to analyzing the texts was informal and thematic, using open coding techniques. Supplementary information was gathered from government agencies and the media. These materials were used to validate the stories told by interviewees, check timelines and confirm that information was accurate.

The appreciative inquiry approach (Cooperrider et al., 2008) allowed for meaningful descriptive and qualitative analysis of interview content. In line with appreciative inquiry methodology, the interviews focused on knowledge-producing dialogue around “strengths, successes, values, hopes and dreams” (Whitney & Trosten-Bloom, 2010, p. 1). This not only encouraged reflective responses but also opened up space for what might be through the interviewees' personal stories of what worked and what might work better and enabled them to include their hopes, dreams and passions for social marketing in NZ.

The interviews took between one and two hours; 11 were in-person and nine were via video conference. All interviews followed the same guidelines. In line with Brinkmann's (2017) observation, the interview format allowed follow-up discussion on the areas that participants saw as important after key questions focused on:

- the time in their social marketing career when they felt excited, joyful or at the peak of their form;
- their beginnings in social marketing and the key steps they had observed in the development of the field;
- their observations on the impact of government policy and leadership on social marketing;

- their thoughts on the NZ approach to social marketing and programs that had made a difference to the field; and
- how they saw the future for social marketing in NZ.

The first author has worked in social marketing and related fields since the late 1990s. His experience working in government agencies, non-profit organizations and marketing agencies provided an insider perspective on the topics discussed with the interviewees. While acknowledging that his personal involvement may bring some bias, we concur with McKie and Munshi (2007) that investigating social issues is compatible with being a committed and opinionated researcher, although “being committed does not excuse you from arguing rationally or producing evidence for your statements” (p. 5).

### **Findings**

From analyzing the interviews and the other sources, the research identified a discernible pattern to the evolution of social marketing in NZ. It emerged partly because most interviewees spoke of the political environment of NZ since the 1980s and its importance to the practice of social marketing. For instance, social marketing manager Nick Farland summed up a common perception:

We would see tidal waves – generally a Labour administration is focused on wellbeing and will get into the [social marketing] space pretty quickly . . . and then generally, National will regard that kind of stuff as “Nanny State” and [therefore] not encouraged (personal communication, April 2, 2019).

Building on these perceptions and publicly available data on politics, we developed a narrative timeline that organized the history of NZ’s social marketing in the following four

major politically- influenced stages: Foundation (1984–1999); Establishment (1990–1999); Growth (1999–2008); and Decline (2008–2017). In constructing these historical stages, the research report interweaves inter- viewee comments and narratives with political changes as well as drawing vivid illustrations from their shared experiences as social marketers in NZ.

### Stage 1

<b><i>Stage:</i></b>	<b><i>Foundation for social marketing in NZ</i></b>
<b><i>Years:</i></b>	<b><i>1984–1990</i></b>
<b><i>Government:</i></b>	<b><i>Fourth Labour Government</i></b>
<b><i>Policy Markers:</i></b>	<b><i>Removal of economic protectionism; Privatization of state-owned industry. Decentralization of health system. Individualization of responsibility for health.</i></b>
<b><i>Social Marketing Milestones:</i></b>	<b><i>Establishment of government agencies with a focus on minimizing harm from Alcohol (Alcohol Advisory Council) and Tobacco (Health Sponsorship Council); Emerging awareness of social marketing scholars.</i></b>

While the conscious adoption of social marketing in NZ did not begin until the 1990s, the political decisions of the Labour Government in the late 1980s were instrumental in creating an environment for social marketing to emerge. The economic reforms created an environment in which individual responsibility for wellbeing emerged (Collins et al., 2016; Schrecker, 2016). However, the fervor with which the government adopted neoliberal economic transformation triggered a need to convince the population of this wisdom. This, according to evidence from interviewees, resulted in a significant increase in mass media spending by government (Bethune, 1995) and normalized government spending on advertising and communication. For example, although these were not labeled as social marketing at the time, during this period the Alcohol Advisory Council (ALAC) and the



Ministry of Transport introduced behavior change programs involving policy, regulation, environment, public relations and advertising activities.

All interviewees identified the most significant element in founding social marketing in NZ as the 1990 establishment of the Health Sponsorship Council (HSC). The HSC was a Crown entity funded solely by government, responsible to an Associate Minister of Health through its Board. The mandate of the agency was directed by the government of the day. The primary focus was to replace tobacco sponsorship in sport. This expanded considerably in the second stage: Establishment.

## Stage 2

<b><i>Stage:</i></b>	<b><i>Establishment of a new approach to change</i></b>
<b><i>Years:</i></b>	<b><i>1990–1999</i></b>
<b><i>Government:</i></b>	<b><i>Fourth National Government</i></b>
<b><i>Policy Markers:</i></b>	<b><i>Ongoing neoliberal reform; Extensive cuts to public spending; Reduced social welfare provision; Users pays healthcare.</i></b>
<b><i>Social Marketing Milestones:</i></b>	<b><i>Programs introduced with a focus on individual behavior change (Smokefree, SunSmart, Auahi Kore, Like Minds Like Mine); First published mention of the term “social marketing” on the HSC website; Adoption of social marketing frameworks focused on individual behavior change.</i></b>

During the 1990s, driven by the HSC, NZ social marketing was seen as an approach to health behavior change. While the HSC had been set up without a focus on marketing, its team faced the challenges posed by the marketing effectiveness of the tobacco companies and chose to respond to it with a social marketing led approach in the succeeding years (HSC, 2012; Potter, personal communication, April 1, 2019).

Social marketing was one of several approaches to behavior change during this period. Public health leader, Sally Hughes (personal communication, March 26, 2019) described how her practice moved from health education to health promotion to social marketing. All the interviewees described a gradual move into social marketing. For many this was a move from public relations, influenced by visits from such international pundits as Ed Maibach, then Worldwide Director of Social Marketing at international PR Agency Porter Novelli.

The HSC's Smokefree brand replaced all tobacco sponsorship of events and activities by 1999 (HSC, 2012). Iain Potter, the chief executive of the HSC from 1992 to 2012, described this takeover of tobacco sponsorship as "a master class in marketing" as the fledgling social marketing community witnessed first-hand the effectiveness of the tobacco companies' comprehensive, three-dimensional and multi-faceted approach to marketing (personal communication, April 1, 2019). By the end of the 1990s, the HSC described itself as "a team of Social Marketers who promote health messages" (McDermott Miller, 2001, p. 19). Their focus on tobacco broadened to include the SunSmart and BikeWise social marketing programs alongside the existing Smokefree and Auahi Kore (Māori tobacco control) programs. These programs all continue to this day.

These long-term programs were established under a neoliberal government led by the National Party and continued the emphasis on individual responsibility of the previous government. The Fourth National Government had an opportunity to close the HSC down when its core purpose (replacing tobacco sponsorship) was fulfilled. However, the government recognized the contribution the HSC had made to the wellbeing of NZ and agreed to continue funding it (Potter, personal communication, April 1, 2019).

In this way, the 1990s saw the establishment of social marketing as a tool of health behavior change in NZ. As noted in the NZ Marketing Magazine, this was accompanied by lively debate on professional concepts (Lawrence, 1999). Potter (personal communication, April 1, 2019) described the 1990s as the development period for social marketing.

### Stage 3

<b>Stage:</b>	<b><i>Growth of a new discipline</i></b>
<b>Years:</b>	<b><i>1999–2008</i></b>
<b>Government:</b>	<b><i>Fifth Labour Government</i></b>
<b>Policy Markers:</b>	<b><i>Departure from neoliberalism to “Third Way” balancing market economy with fair society; Reformation of employment laws; Improved human rights.</i></b>
<b>Social Marketing Milestones:</b>	<b><i>Political support for social change and social marketing; Sorted financial literacy program launched (first non-health related social marketing); Social marketing: Behaviour change marketing in New Zealand published (Bridges &amp; Farland, 2003); 1st NZ social marketing conference – Social Marketing for Social Profit (2003); Social Marketing Downunder community of practice formed (2005) and conferences held (2005, 2007); 1st national Māori social marketing forum (2007); 1st social marketing academic university course (2008); Social marketing models expand beyond 4Ps to include a focus on policy and stakeholder partnerships.</i></b>

From 1999 on the new Prime Minister, Helen Clark moved NZ away from the neoliberal agenda of the last two governments in favor of a “Third Way” that aimed “to achieve a better balance between a dynamic market economy and a fair society, which offers opportunity and security for all” (Clark, cited in Kelsey 2002, p. 50). The change in political thinking with a supportive Prime Minister opened more opportunities and enabled the HSC to move into the next decade with confidence (Potter, personal communication, April 1, 2019). The Labour government’s strong support for social marketing is demonstrated in the keynote speech delivered by Trevor Mallard, then Labour Minister of Education, to the first social

marketing conference in Wellington on October 21, 2003: “As the government, we invest in social marketing programmes for one important reason: we want to create positive social change” (beehive.govt.nz, 2003).

Hughes titles this period the “golden age of social marketing” (personal communication, March 26, 2019). Practitioners recognized the importance of building connections, making friends, sharing learning, and working together with stakeholders committed to a healthier society (Potter, personal communication, 2019, 1 April). Leading social marketer, Tracey Bridges (personal communication, April 2, 2019) described this period as having “a lovely nascent, flourishing sense of excitement . . . lots of people doing lots of [social marketing] which meant lots of really cool conversations.” She and others also noted the changed conditions of increased support through the new Labour-led government, the development of strong networks and a marked increase in learning opportunities and workshops for social marketers provided mainly by HSC.

NZ’s first social marketing resource: Marketing Social Change (HSC, 2001) included the first NZ definition of social marketing as: “a social change tool that aims to increase the acceptability of specific social behaviors and practices. Social marketing involves communicating social messages to an audience in a credible way with the aim of influencing their thinking and actions” (p. 2). This early definition of social marketing was heavily focused on communication. It did not include the marketing mix, audience segmentation and customer insight that featured in social marketing thinking elsewhere at that time. Furthermore, in a decision that reduced the scope of social marketing, “partnerships, which appear to include audience research, policy, health promotion, and other activities, were positioned as complementary to social marketing activities” (Antric et al., 2019, p. 4).

By 2003, Lambert could claim that “evidence of the acceleration in social marketing activity can be seen every night on television” (2003, para. 4) with messages on smoking, sun safety, alcohol, injury prevention and other topics being presented by government agencies. This was also the period when Māori-focused campaigns such as the tobacco reduction It’s About Whānau smoking cessation campaign, started to flourish. This campaign used Māori cultural values such as whakapapa (genealogy), whānau (extended family) and the threat to both offered by smoking related illnesses (Grigg et al., 2008). The proliferation of social marketing featured NZ’s first social marketing conference Social Marketing for Social Profit in October 2003, in Wellington (HSC, 2004a). In the lead up to the conference, Bridges and Farland (2003) published a guide: Social Marketing: Behaviour Change Marketing in New Zealand. They suggested extending the four Ps classic marketing mix to six Ps of social marketing, including policy and partnerships. This sat beside a more comprehensive definition of social marketing:

Social marketing is the use of marketing principles and techniques to improve the welfare of people and the physical, social and economic environment in which they live. It is a carefully planned, long-term approach to changing human behaviour.... Social marketing is also used to help create environments that support the desired behaviour... it aims to benefit the target audience and society as a whole. (HSC, 2004b, para 1–4)

Significantly, the definition gave NZ social marketing a greater upstream focus and moved it from the social advertising approach into line with contemporary conceptualizations of social marketing’s role in society and the diverse tools contemporary practitioners were using to influence behavior change as well as social change (Lefebvre, 2013). NZ social marketing’s natural alignment with health promotion and the unique place of NZ’s founding

treaty between Māori and the Crown produced an equity focused practice. This aligned with the new public health moves and a focus on the social and economic determinants of health.

In the first decade of the 21st century, interest in social marketing was high. The HSC established a network Social Marketing Downunder following the success of the initial conference. Two further social marketing conferences were held (HSC, 2006, 2008) featuring global scholars such as Rob Donovan, Jeff French and Gerard Hastings. The 2005 conference was preceded by the first national forum on the relevance of social marketing to Māori, attended by 85 delegates. This was the first gathering of indigenous social marketers we have identified anywhere, and demonstrates the interest in using social marketing to improve indigenous health and wellbeing.

According to Potter (personal communication, April 1, 2019) the establishment of a social and behavioral research group demonstrated the maturity and growing confidence of the HSC and the NZ social marketing community in general. However, social marketing was not without its challenges: Medcalf (2006) quoted Liz Read's, social marketer turned corporate affairs director at Lion Nathan (a major supplier of alcoholic beverages in NZ), concerns about social marketing clutter in the media. While her comments go on to conflate health communication and education with social marketing, they do highlight an issue that interviewees mentioned consistently – a lack of understanding of social marketing. This was an early example of commercial marketing trying to reduce the influence of social marketing (Hager, 2014).

The misunderstanding of social marketing is frequently explained in the literature as resulting from a lack of a common academic framework. One attempt to address this saw the launch of the first university paper taught in NZ: Massey University's Advanced Social

Marketing. This course was developed by Janet Hoek with support from the HSC (Hoek, personal communication, December 13, 2019). It was introduced in 2008, 18 years after the launch of academic programs in Australia and other nations. The relative lateness may reflect the challenges faced by small nations like NZ in developing support for new jurisdictions of work (Abbott, 2014).

Nevertheless, by 2008 and the end of this period, many New Zealand government and non-profit organizations had adopted social marketing as a means of delivering behavior change programs (HSC, 2008; Thornley & Marsh, 2010; Thornley & Waa, 2009). These included HSC, ALAC, Ministry of Health, Retirement Commission, National Screening Unit, the Cancer Society, and the Fire Service. NZ Marketing Magazine's Microman column identified how "behaviour-modifying advertising (or social marketing as they call it in the linoleum corridors of Wellington) now makes the advertising spend of the [major national and international corporations] look like small potatoes" (Davis, 2008, p. 47). Davis linked this popularity firmly to the Labour government.

The National Party opposition in the lead up to the 2008 election "was looking for a hook," a way to demonstrate a difference to the nine years of Labour-led government. That hook, according to Potter (personal communication, April 1, 2019), was to brand the Labour-led government as "Nanny State" largely on the back of a strong Labour PR-led social marketing campaign to pass an anti-smacking bill (Abolition of Force as a Justification for Child Discipline). The public debate saw a sharp divide between supporters and opponents of the bill and the government social marketing activities. It is also notable that John Key, leader of the National Party campaigned for government spending cuts across the board, preferring frontline services over preventative services such as social marketing (Key, 2008).

**Stage 4**

<b>Stage:</b>	<b><i>Decline and social marketing losing its supporters</i></b>
<b>Years:</b>	<b><i>2008–2017</i></b>
<b>Government:</b>	<b><i>Fifth National Government</i></b>
<b>Policy Markers:</b>	<b><i>Reintroduction of neoliberal reform, tax cuts; Further privatization; State sector reduced; Social investment reduced.</i></b>
<b>Social Marketing Milestones:</b>	<b><i>Minister of Health canceled social marketing conference; HSC and ALAC disestablished (2012); Health Promotion Agency established (2012); Social marketing funding redirected; Public health unit funding frozen.</i></b>

Life under the Fifth National Government of New Zealand (2008–2017) was very different for social marketers. By early 2009, the new political environment meant that social marketing practice had to change (Bridges, personal communication, April 2, 2019). Potter summed it up succinctly: “the phrase, the ‘Nanny State’ was being used just to bash people senseless. There was a witch hunt, you weren’t even allowed to use the [term] social marketing” (personal communication, April 1, 2019). From the first author’s first-hand observations, a climate of fear entered the Ministry of Health with many public health specialists removed from its workforce. Potter said it was “like a step back into the dark ages all based on a political decision . . . they didn’t care, just get rid of it – burn the witches, can’t say those words [social marketing]” (Potter, personal communication, April 1, 2019). All the inter- viewees identified this decline in the use of social marketing although, according to Bridges (personal communication, April 2, 2019) this wasn’t unique to NZ but perhaps began earlier here than elsewhere. The rationale of health minister Ryall was simple: “we weren’t to continue doing what the other lot were doing, [he didn’t] want to see government funded messaging in people’s faces” (Potter, personal communication, April 1, 2019).



**Table 1.** A Summary of the Features of NZ Social Marketing Across the Four Stages.

Stage	Period		Social Marketing Features:							
		Exploration	Advertising and Communication	Individual Behavior Change	Exchange	Marketing Mix	Audience Insight	Stakeholder Engagement	Policy and Determinants	Community Action
Foundation	1984–1990	✓	✓	✓						
Establishment	1990–1999		✓	✓	✓	✓				
Growth	1999–2008		✓	✓	✓	✓	✓	✓	✓	✓
Decline	2008–2017		✓	✓						

This began the decline of social marketing in NZ. Practitioners who believed themselves to be leading the world in the field found themselves having to leave the practice behind. The HSC was forced to cancel the third Social Marketing Downunder conference (HSC, 2008). The government of the day presented the conference as wasteful, despite its important role in sharing practice, knowledge and learning. This theme was common during this period with then Prime Minister Key announcing cutting the Push Play healthy activity social marketing programs in favor of funding exercise equipment and clothing (Watkins, 2009), and the health minister cut tobacco-related social marketing budgets in favor of “frontline services” (Bennett, 2010). However, interviewees identified some positives to the changing environment:

On the one hand we had too many programs costing too much money with no discernible measurement and no way of proving their worth, and actually some of them deserved to die... [however,] the baby had been thrown out with the bathwater... Programs such as Push Play...were cancelled despite being multi-dimensional, well-researched and targeted (Bridges, personal communication, April 2, 2019).

She concluded that, after the “lovely nascent, flourishing sense of excitement” of the 1999–2008 period came “the squashing, the silencing.”

The National government’s aversion to what it characterized as the “Nanny State” was reinforced by advocacy from food and grocery marketers (Hager, 2014). The influence of manufacturers of sugary foods, alcohol and tobacco on government policy became increasingly common during this period, (Hager, 2014; Munro, 2019). The tactics used by the commercial interests represented by bodies such as the Food & Grocery Council had adopted the 5th and 6th Ps of social marketing: policy and partnership. Thus, the combination of commercial and political influence worked to remove social marketing from the landscape of health behavior change.

The end of social marketing under the National Government can be understood in the context of the revival of neoliberal thinking that rejected the upstream social marketing approach. Moving public health and social marketing “to a personally mediated behavior change was the death knell [for social marketing]” (#13, personal communication, March 29, 2019).

Interviewees spoke of their frustration about the interpretation of social marketing as “behavior-modifying advertising.” While strategy and research were the common elements of social marketing across all the interview discussions, this did not carry over into other understandings of the work. One interviewee commented that “blind ignorance of the role that commercial marketing plays, that the policy environment plays, and that people just have to make better choices . . . has really destroyed a lot of the really great progress” (#13, personal communication, March 29, 2019). The influence of commercial interests eventually ended the HSC as a champion of social marketing. Even the language of social marketing

was removed from key documents (HSC, 2011; Wano, 2009). Accordingly, Cabinet agreed to disestablish the HSC and “transfer their functions to an arms-length health promotion entity” (Ryall, 2011).

### **The Health Promotion Agency**

The Health Promotion Agency (HPA) began operating on 1 July 2012, bringing different leadership and focus to the field. The agency took responsibility for the previous HSC programs on obesity, tobacco and sun safety, the ALAC led alcohol program and “sexual health, Māori public health promotion, immunisation (except influenza), health education resources, ‘Like Minds Like Mine’ and the national depression initiative” (Pannett, 2012, p. 3) previously managed by the Ministry of Health. According to the NZ Public Health and Disability Act the HPA was established to “lead and support activities to promote health and encourage healthy lifestyles” (s. 58).

Although the political and commercial influences were clear, the driver for the creation of the new agency was presented as an opportunity to reduce costs (Kitteridge, 2011). The new agency lacked many of the strengths of the HSC, its connections with other agencies and communities as well as the experience-grounded expertise and wealth of knowledge held within the agency (HSC, 2011). Boswell et al. (2019) directly criticized the HPA for avoiding any controversial challenge, observing that the “HPA has historically been more of an obstacle than vehicle for leadership on preventive health” (p. 207).

Katherine Rich, former National MP and CEO of the New Zealand Food & Grocery Council, was appointed by the National government to the board of the HPA in 2012 (Child, 2015). As the industry lobbyist, she continued to lobby and fought against “attempts at alcohol and tobacco law reform, public health policies aimed at reducing obesity, and various other public interest initiatives” (Hager, 2014, p. 83). The inclusion of Rich on the HPA

board, and the resulting scandal demonstrated how the “HPA entailed a rather uneasy and incoherent compromise between the progressive forces of preventive health and the conservative National led government and its allies in the industry” (Boswell et al., 2019, p. 206).

The HPA did not continue the HSC’s championship of social marketing. Half of the interviewees mourned the passing of the HSC and as one interviewee described it, the “HPA’s performance was a significant contribution to the decline of social marketing in New Zealand” (#15, personal communication, March 20, 2019). Interviewees also criticized the leadership of the HPA for a lack of understanding of social marketing, a desire to please the Minister at all costs, and a purely downstream focus.

One former HPA employee noted that more budget was going into advertising than had happened under the HSC. He described the HPA’s inability to build strong relationships with the sector and a shift to an increasing focus on promotion (#16, personal communication, March 25, 2019). He further noted that the new organization demonstrated an incredible aversion to risk, “they didn’t want to stick their head above the parapet. It was all tied to a ‘no surprises’ policy from the government” (#16, personal communication, March 25, 2019). He, and others, also noted the loss of the Wellington based Social Marketing Network, biennial conferences and the Social Marketing Downunder website that used to be managed by HSC. As the former HSC employee expressed it, “a lot of the social marketing approach died away” (#16, personal communication, March 25, 2019). He described how the HPA was often driven politically – with Ministers dictating subjects and timeframes – and invested in advertising rather than social marketing. He further felt that HPA activity: “wasn’t based on what was best for families . . . but on what was best for the

government in power . . . [and] timeframes resulted in real compromises which felt uncomfortable.”

### **Discussion and Conclusions**

The study findings suggest that social marketing in NZ had gone from an advanced multi-level comprehensive approach inspired by best practice elsewhere to a practice focused around advertising and promotion. Twenty years of growth and learning had been lost. Ironically, part of the neoliberal agenda – specifically around individual responsibility for health – had prepared the ground for the rise of social marketing while another part of that agenda – avoiding state intervention and relying on “the market” – had caused a precipitous fall. Both testify to the dependency of the professional function in New Zealand on government approval and funding.

This article analyzed the perceptions of NZ social marketers who were involved in the development of the practice from its beginnings. They identified changes in political thinking as the major factor that had impacted the evolution and use of social marketing. According to the interviewees’ observations, neoliberalist moves under Labour (1984–1990) enabled the emergence of social marketing as it was focused on approaches that assumed individual responsibility for health and this aligned well with the then government’s political agenda.

In the second stage the new National government continued to support the use of social marketing as it served its political belief in individual responsibility for health. Stage 3 (1999–2008) saw the Labour Government’s greater focus on a fairer society and a more prosocial political environment that enabled the development of social marketing with an upstream focus. However, the success of this prosocial approach was criticized by the opposition National Party that portrayed Labour’s social marketing activities as the

embodiment of a “Nanny State.” As National returned to power (Stage 4, 2008–2017), the government disestablished the major social marketing agency and replaced it with a health promotion agency that used social advertising rather than social marketing thus reducing interventions for social change and allowing the influence of commercial lobbyists.

The study is limited to social marketing in NZ. Further research investigating other political systems would allow for comparisons and make a contribution to overall social marketing scholarship. As the NZ market is relatively small, the sector is dominated by government and thus subject to political change. In larger nations where non-profits are not simply “little arms of the state” as in NZ (Larner & Craig, 2005) and where corporate and philanthropic bodies play an active role in social marketing the practice might be less dependent on government approval or funding. Though the political phenomena in New Zealand might not match the timing of political events and trends in other countries, the ebb and flow of neoliberal policies occurs in most countries that are largely based on the capitalistic economic system. These give this research relevance to social marketers outside New Zealand and provide a starting point for others based elsewhere to explore the political impact of neoliberal concepts on the profession.

The NZ experience confirms the literature on the importance of political and government support if social marketing is to thrive (Andreasen, 1995). NZ social marketers suffered from the perceived alignment of their practice with the Labour government (1999–2008) and this led to its decline under the succeeding National government. The practice’s dependency on government challenges the ability of social marketing programs to deliver long-term and effective services to communities in need and to improve public health.

The expert interviewees argued that the politicization of social marketing resulted in harm to NZ society. They attributed the decline to decision makers' lack of understanding of the value of social marketing and emphasized the need for better communication with politicians from across the political spectrum about the need for less politicized and independent social marketing services.

This article argues that without a solid evidence base and robust understanding of social marketing's role in society, political whim can too easily decimate a practice capable of achieving better outcomes for public health and wellbeing. The NZ experience suggests that an ongoing effort to explain the contribution of social marketing interventions in order to gain greater political support is essential and should be built into the training of future social marketers. There is a need for academics, practitioners and others with a commitment to social marketing to gather evidence of value and effectiveness and communicate this to decision and policy makers. We therefore join with Deshpande (2019) and Lee (2020) in calling for social marketers to promote social marketing noting that this includes a focus on policy, partnerships and systems.

NZ's political agendas facilitated the emergence of social marketing with a downstream focus but turned hostile to the practice when social marketing shifted focus to upstream social change and to the wider determinants of health. In considering the future of our field, these experiences led us, firstly, to align with French and Gordon's (2015) call for "a social progressive model of social marketing" (p. 44) in order to disavow affiliation with neoliberalism and, secondly, to agree with Lefebvre's (2011) contention that embracing "the 'social' of social marketing positions us much better to have a place at the table of social policy" (p. 40). In our account of the rise and fall of social marketing in New Zealand, we conclude by acknowledging that legitimacy concerns remain but still argue for reinforcing

proactive and egalitarian directions so that the field can continue and expand its positive contributions to social change. In addition, we recommend that social marketers consider the impact of political factors on the practice and be proactive to mitigate risks as well as seize opportunities.

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## **CHAPTER 5: SOUL SEARCHING: PUBLIC RELATIONS, REPUTATION AND SOCIAL MARKETING IN AN AGE OF INTERDISCIPLINARITY**

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### **Abstract**

Positioning the present as an age of interdisciplinarity, we explore the potential for development through selected intersections, primarily with PR and social marketing. We situate this exploration in the further context of the contemporaneous search for what some management theorists have called soul. In the process, as well as contributing to the PR and social marketing bodies of knowledge, we seek to clarify academic deliberations about selecting productive and prosocial interdisciplinary intersections. To begin to illustrate parallel process in practice, we embed practitioner perspectives in an account of social

marketing in Aotearoa New Zealand<sup>5</sup>. Our intent is to look for ways in which both scholars and practitioners could get better at it. We conclude by suggesting that intersecting with social marketing can also help PR tackle three major and continuing issues: methods, outcome evaluations, and reputation.

### **Introduction: an age of interdisciplinarity and a search for soul**

Since the 1990s, proponents of interdisciplinarity (Fuller, 1993; Kockelmans, 1998; Hansson, 1999; Payne, 1999) have argued that interdisciplinarity offers a conceptual and practical means of answering questions and providing solutions to problems that cannot be successfully addressed by single discipline approaches. Klein (1996) allows that interdisciplinarity can be driven either by the aim of unifying knowledge or by social intent and Aram (2004) argues that it is the scholars who determine the focus. Along those lines, as self-confessed interdisciplinary ideologues themselves, Fuller (1993) “believe that, unchecked, academic disciplines follow trajectories that increasingly isolate themselves from the most interesting intellectual and social issues of our time” (p. 29).

Although, Frodeman (2017) later claimed it to have “been 25 years in the making” (p. vii), he became lead editor of the ground-breaking first edition of *The Oxford Handbook of Interdisciplinarity* (Frodeman et al., 2010). Already, Braun and Schubert’s (2003) article “A

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<sup>5</sup> We use Aotearoa New Zealand in recognition of the two groups that call these islands home: tangata whenua – the indigenous peoples, commonly referred to as Māori – and tangata tiriti – the peoples for whom Te Tiriti o Waitangi (New Zealand’s founding document, the Treaty of Waitangi) established their right to live here. We do this to recognise the two cultures that formed this nation and the challenges and strengths this has created. Any reference to Aotearoa or New Zealand should be seen as a recognition of both.

Quantitative View on the Coming of Age of Interdisciplinarity in the Sciences 1989–1999” published statistics from the last decade of the 20th century that underpinned this decade as part of a burgeoning of interdisciplinarity, on the cusp of a full age of interdisciplinarity in this century.

In a different field but engaging with the similar *Zeitgeist* of intellectual and social issues, Adler and Jermier’s (2005) seminal *Academy of Management Journal Editors’ Forum* called for “Developing a Field with More Soul” (p. 941). Although the term may be conceptually vague, PR has long had a practical stake in developing soul. In Cutlip’s (1994) “Prologue,” he acknowledged that his monumental history of PR had its genesis in drawing attention to “the good for society that can be accomplished through ethical, effective public relations” (p. ix), and to illustrate his belief that “only through the expertise of public relations can causes, industries, individuals, and institutions make their voice heard in the public forum” (p. ix).

Marchand’s (1998) history similarly recounts how late 19th and early 20th century PR contributed to improving “the plight of the soulless corporation” (p. 7). His book title calls this improvement process “*Creating the Corporate Soul: The Rise of Public Relations and Corporate Imagery in American Big Business*” (Marchand, 1998) and he charts how corporations employed PR to counteract public perceptions that the “big business corporation, as a rising chorus of American voices chanted insistently from the 1890s onward, had no soul” (p. 7).

Business in general – see, for example, Rudebeck (2019) and Rubin and Carmichael (2018) – still seeks public recognition of their souls. PR practice in particular – often by advocating through academic pathways, such as Bernays’ insertion of PR in higher education

institutes and through his various books (1952, Bernays, 1923; 1955) – has undertaken the same search. Recent signs of the quest can be seen in how Capozzi and Spector's (2016) advocacy in *Public Relations for the Public Good* sets out to illustrate "How PR has shaped America's social movements" and adds to what they see as the growing scholarship "around the influence of public relations on world history" (p. xi).

In this more fully-fledged age of interdisciplinarity, academic fields increasingly aspire to "soul" scholarship to alleviate "a world of immense and unnecessary suffering and destruction" (Adler & Jermier, 2005, p. 941). In other words, reputational capital is at stake in educational disciplines, including PR, as well as in the marketplace and society. Moreover, academics often seek to fuse business and disciplinary claims to soul. Kempster et al. (2019) *Good Dividends: Responsible Leadership of Business Purpose* uses the "dividends" language of financial returns and co-opts the common PR term "stakeholders" to support such contemporary assertions as "Business has the very real potential to be the greatest mechanism on the planet to enhance humanity, if it can do this profitably and generate *dividends* for all its stakeholders" (p. 3). In PR, the movement with most traction is Heath's (2013) Fully Functioning Society Theory (FFST), which "reasons that public relations theory is best when it challenges and helps organizations be effective not only by what they do for themselves but also with the communities where they operate and on whose resources they depend" (p. 368). Instead of arguing that PR is entitled to social status, FFST offers a form of academic activism suggesting what PR might do to earn the right to public support.

However, critical PR scholars frequently criticize PR as being "a strategic tool for corporates and governments to realize self-interest and advantage in competitive environments" (Edwards, 2015, p. 60) because it "tends to be used most widely by already dominant groups in society, further increasing their power and distorting debates in favour of

their interests” (p. 63). Unlike social marketing, which works mainly on behalf of governments and nonprofit organizations to promote a common good and a positive behaviour change, PR, like marketing tends to also serve the business sector where priorities often align with the corporate financial bottom line.

The content of much existing non-corporate PR work (enables it to fall under Adler and Jermier’s (2005) defining description of aspiring to alleviate “a world of immense and unnecessary suffering and destruction” (p. 941). PR practitioner activity in nonprofit organizations includes: fundraising for bodies that protect human rights and help essential services (e.g., Red Cross, UNICEF); manage relationships with volunteers, promote social change while serving civil rights and other progressive movements; lobbying to limit gun use and so on ([https://ssir.org/articles/entry/lobbying\\_for\\_good](https://ssir.org/articles/entry/lobbying_for_good)). Although this offers strong support for soul in PR functions, all of them might be abused in PR services to less soulful organizations. Looking to add value to FFST through interdisciplinarity, this article explores how intersections between PR and social marketing could not only do more to enact such an alleviation but could also clarify academic deliberations about selecting, or practitioner accounts of arriving at, productive interdisciplinary intersections, and how both theory and practice could get better at it.

### **Jurisdiction perspectives (1): Professions, promotional disciplines, and the fight for the good**

Interdisciplinarity is not just a logical and innocent process of finding common ground and forging connections. It also involves territorial disputes around jobs, as well as considerations of academic, professional and social status. Writers in the PR literature (e.g., Abdullah & Threadgold; 2008; Pieczka & L’Etang, 2001; L’Etang, 2004; Toledano, 2010)



follow sociologists (Abbott, 1988; Neal & Morgan, 2000) in foregrounding the role of an exclusive jurisdiction in establishing a profession. Such scholarship stems from Abbott's (1988) analyses of how occupations gain professional status through winning demarcation disputes or what he calls "jurisdiction" in an area by "taking over" (p. 33) another profession's tasks. The jurisdiction perspective has academic parallels that help explain the frequent disciplinary engagements of PR with marketing. McKie and Willis (2012) track recent attempts by marketers to openly subsume PR by bringing it under the jurisdiction of marketing. There are similar demarcation issues as disciplines compete for soul in terms of the good. Kotler, Hessekiel and Lee (2012) are explicit on this in their book title: *Good Works: Marketing and Corporate Initiatives That Build a Better World – and The Bottom Line*. We contend that these competitive encounters between PR and marketing have a long record partly explicable through boundary shifting linked to historical developments in marketing.

Although the story is significantly more complex and substantially larger than our account, we will, for brevity and clarity, present a simplifying narrative overview constructed through three aspects: Philip Kotler's "broadening" of marketing, the invention and rise of the field of social marketing, and how those first two intertwine. Kotler is one of the top marketing academics in the world and a prime mover in the way that marketing has set out to bring other disciplinary areas and ideas of soul under its auspices. For this part of the article, prior to considering his foundational and continuing contributions to social marketing, we focus on Kotler's (cited in Dibb & Carrigan, 2013) own retrospective account. Kotler (cited in Dibb & Carrigan, 2013) recalls how, initially with Sidney Levy as co-author, he set out to "broaden marketing" (Kotler & Levy, 1969, p. 1379). Together, they argued that marketing "can be applied to. . . places (cities, regions, nations), people (celebrities or creating

celebrities) and causes (eat more nutritious foods, exercise regularly)” (Kotler & Levy, 1969, p. 1379). In terms of jurisdictions, this bold bid had, and continues to have, substantial purchase. Specific examples of those particular applications in practice continue over 30–50 years later: Campelo’s (2017) *Handbook on Place Branding and Marketing*, Thompson’s (2000) *The Role of Celebrities in the Promotion of Products as a Marketing Strategy*, and Wansink’s (2005) *Marketing Nutrition: Soy, Functional Foods, Biotechnology, and Obesity*.

Despite these tangible outcomes, marketing’s jurisdiction is not exclusive to the extent that PR and other fields keep contesting the imperialism through jurisdiction capture, notably in each of the specific named areas – public diplomacy experts participate in place branding, PR professionals represent celebrities, and health promoters publicize good nutrition. Nevertheless, the outcomes of Kotler’s “broadening” project extend as far as the moon in Scott and Jurek’s (2014) *Marketing the Moon: The Selling of the Apollo Lunar Program* and his early revised definition of marketing as “serving human needs and wants sensitively” (Kotler & Levy, 1969, p. 15) continues widen marketing’s reach. The current high water mark may be in Seth Godin’s (2018) attempted colonization of social change when, in *This Is Marketing*, he asserts that: “*Marketing is the act of making change happen*” (p. xiv).

Kotler was also successful to an extent in persuading others in other promotional fields, including PR (Moriarty, 1994; Smith, 2012), to integrate under a broad marketing, or Integrated Marketing Communications (IMC) banner. Moriarty (1994) propounds “The benefits of integration” (p. 38) for PR and IMC and Smith (2012) proposes that PR’s contribution to IMC is the way to secure the field’s future. Outside the two fields, others simply accept the co-option of PR into marketing as in Key and Czaplewski’s (2017) nomenclature “Marketing Public Relations” (p. 328) and Padyani (2008), who, writing from

the nonprofit sector, presents marketing as “an essential strategic management function” (p. 11) a definition that, without the strategic, is all too familiar to those in the PR field.

Although not relevant to the interdisciplinary focus of this article, more recent incorporations of traditional PR activities by marketing range from cause-related marketing through relationship marketing to purpose branding.

On the other side, among the PR resistance to incorporation by marketing, Hutton (2001; 2010) has made significant contributions. In the *Handbook of Public Relations* (Heath, 2001), Hutton (2001) contends that the most important challenge of PR is to define the boundaries with marketing and at the end of the decade, Hutton (2010) made an even stronger call to resist marketing attempts “to include or subsume much or all of public relations” (p. 509). McKie and Willis (2012) similarly opposed marketing imperialism and forced integration (p. 851) and called for renegotiating “traditional turf wars between the two fields” (p. 846). In the age of interdisciplinarity, we suggest firstly, that mindful intersections with social marketing would be a better option. Before beginning to consider intersections, we draw attention to one striking contrast between social marketing and PR. Social marketing stands as a prosocial field taking a substantial part of its identity from opposing business or commercial marketing – as in Hastings and Domegan’s (2017) *Social Marketing: Rebels with a Cause*. In sharp contrast, although corporate PR is a category of PR, social PR is not conceptualized as a common opposition force, especially in the key genre of PR textbooks, even though activist PR, community relations and nonprofit PR all usually earn an individual subsection in the same textbooks.

### **Jurisdiction perspectives (2): is social marketing pure soul?**

Kotler's "broadening" project helped marketing expand but he seems to have almost simultaneously attempted to distinguish a more soulful section within the main field. Certainly, he is acknowledged as being the first to use the term social marketing in the landmark paper *Social Marketing: An Approach to Planned Social Change* (Kotler & Zaltman, 1971), although, as in PR history, scholars trace the roots of much of its practice much further back. Donovan and Henley (2003) link social marketing to national propaganda efforts, Lee and Kotler (2011) connect it to the work of the suffragettes and Chandy et al. (1965) relate it to family planning in India.

Almost half a century after the term was coined, social marketing is an accepted means of achieving positive individual and societal change through the use of marketing principles and techniques (Dibb & Carrigan, 2013; Donovan & Henley, 2003; Lefebvre, 2013). The practice has been used to great success in different arenas across the globe, particularly in the health arena (Cheng et al., 2011), and is now recognized as part of a solution to wicked social problems (Dibb & Carrigan, 2013) and operates at both a population (Lefebvre, 2011, 2013) and strategic level (French, 2015). Social marketing has roots in history but has continued to expand in range, in geographical reach, and in academic methods since 1971.

Most noticeably, social marketing, albeit unevenly, has continued to expand in the academic arena too. Dibb and Carrigan's (2013) editorial in their special issue of the prestigious *European Journal of Marketing* on "Social Marketing Transformed" identifies the following "clear markers. . . as evidence of the growing status of the field" (p. 1377):

the launch in 2011 of the *Journal of Social Marketing* from the Emerald stable; the thriving World Social Marketing Conference; the establishment of several social marketing research centres, including the Institute for Social Marketing at the University of Stirling, ISM-Open at the Open University, and the Bristol Social Marketing Centre at the University of West England; the founding of the National Social Marketing Centre; the emergence of a growing number of university courses and training programmes in social marketing. (p. 1377)

Nevertheless, social marketing remains a misunderstood, or what we would more accurately describe as a contested, term. While many identify lack of definitional clarity as a failure of logic, we see differing definitions more as signs of jurisdictional competitions. In his attempt to update definitions based on more recent definitions of marketing in the USA and UK, Dann (2010), for example, identifies more than 40 definitions of social marketing. However, his revised definition of “the adaptation and adoption of commercial marketing activities, institutions and processes as a means to induce behavioral change in a targeted audience on a temporary or permanent basis to achieve a social goal” (Dann, 2010, p. 151), fails to account for social marketing aimed at social structures or political decision-makers. His definition thus ignores the focus of much contemporary social marketing in addition to missing an obvious intersection with PR. On definitional points, we take our bearings from Williams’s (1983) insight that differing meanings on conceptually and politically contested areas are “inextricably bound up with the problems” they are “used to discuss” (p. 15). In other words, since “meanings are part of every problem and every attempted solution” (Hodge, 2017, p. vi), marketers and social marketers frequently disagree on definitions not over matters of logic but because of significant differences about how their contemporary practices should be enacted, thought about, inhabited, and whom they should seek to serve.

Or, to follow Hastings (2007), in arguing for social marketing to use marketing methods, memorable title: *Why Should the Devil Have All the Best Tunes*.

It needs to be borne in mind that, for scholars, achieving a consensus on a definition for a discipline can be political. The *International Social Marketing Association*, the *European Social Marketing Association* and the *Australian Association of Social Marketing* canvas of their members helped develop the following definition that embraces marketing concepts and other social change techniques:

Social Marketing seeks to develop and integrate marketing concepts with other approaches to influence behaviours that benefit individuals and communities for the greater good. Social Marketing practice is guided by ethical principles. It seeks to integrate research, best practice, theory, audience and partnership insight, to inform the delivery of competition sensitive and segmented social change programmes that are effective, efficient, equitable and sustainable. (Morgan, 2017)

At least, this definition recognizes that social marketers draw on a wide range of disciplines and tools to benefit individuals and societies. More importantly, it situates social marketing at the intersection of multiple disciplines. Recently, Kotler, with others, tried to expand using a different discipline marker “If social marketing is to be a discipline, it needs a process. Nancy Lee and I... worked out a 10-step process. If political marketing is to be a discipline, it too must work out a ten-step process” (Smith, 2012, p. 6). This may be a good tactic to guide readers and students to the sixth and latest edition of the Lee and Kotler (2019) textbook *Social Marketing: Behavior Change for Social Good* but publication success in that market does not cement Kotler’s assertion of the need for a set process as a discipline marker. This is because a set process alone does not necessarily win the assent of interdisciplinary

scholars or other social marketers, particularly for a magpie discipline such as social marketing. Moreover, the separation of process from purpose allows social marketing to be “an amoral technology that can be used for good or ill” (Hastings & Domegan, 2018, p. xxxiv).

### **Jurisdiction perspectives (3): the evolution of social marketing in Aotearoa New Zealand**

On the ground, from the perspective of practitioners, the growth of social marketing appears even less clear cut. To illustrate this, we consider social marketing developments in New Zealand from its emergence in the 1990s. During this decade, agencies such as the Land Transport Safety Authority (LTSA), the Alcohol Advisory Council (ALAC) and the Health Sponsorship Council (HSC) were exploring the use of mass media alongside environmental factors and policy interventions to change behaviors. The conscious adoption of social marketing in New Zealand can be dated specifically to 1999 when the HSC began to describe itself as “a team of Social Marketers who promote health messages” (cited in McDermott Miller, 2001, p. 19). This was also the year in which information on social marketing first appeared on the HSC website. From its emergence, the New Zealand version of social marketing appears as the child of several parents rather than simply the offspring of the application of marketing techniques within the social change space. In New Zealand’s first published social marketing resource, the HSC (2001) defined social marketing as “a social change tool that aims to increase the acceptability of specific social behaviours and practices. Social marketing involves communicating social messages to an audience in a credible way with the aim of influencing their thinking and actions” (p. 2).

In the HSC's (2001) initial publication, partnerships, which appear to include audience research, policy, health promotion, and other activities, were positioned as complementary to social marketing activities. However, within three years, the HSC's (2004) *Social Marketing Downunder* website has evolved this thinking with social marketing serving as the inclusive term for an increasingly wide-ranging area of activities. HSC's (2004) definition expanded to include "the physical, social and economic environment in which they live" (HSC, 2004) rather than just focusing on individual behavior change. Aotearoa New Zealand may have come to the social marketing party late but like other "parents" of the discipline, practitioner interventions, notably from PR and public health, influenced its constituent parts and practices. The leaders of this "new" practice would shape its emergence over the next decade. Within the private sector, Tracey Bridges, of the PR agency Porter Novelli, and Nick Farland, of advertising agency The Bridge, became advocates and published what became "the book": *Social Marketing: Behaviour change marketing in New Zealand* (Bridges & Farland, 2003). Visits from Porter Novelli's Worldwide Director of Social Marketing Edward Maibach and the delivery of HSC social marketing workshops by PR practitioner Hoani Lambert further compounded the influence of PR on social marketing.

Nor was it just a matter of promulgation, the emerging field was absorbing practitioners to deliver it and, in a small nation, these, of necessity, came mainly from the existing workforce. As PR practitioners were already involved in delivering social campaigns, engaging with decision-makers and understanding the various groups that needed to be reached, they were the logical choice. Public health practitioners would also play a part, but the people with experience of national campaigns and existing media relations were mainly drawn from PR. Thus, these two groups would shape the development of a New



Zealand-style social marketing developing an intersectional practice that is today recognized by those in the field as the golden age of social marketing in Aotearoa.

Coombs and Holladay (2010) suggest PR is about advocacy, power and using influence within a web of relationships. That foundation would be a natural starting point for PR practitioners moving into social marketing and using their relationships to build partnerships, and to advocate for change that would deliver to the goals of the program. Indeed, advocacy, along with a focus on opinion leaders and intercessory publics, has sat at the center of PR for much of the discipline's history (Smith & Smith, 2013). Accordingly, New Zealand PR provided a quite different starting point for developing social marketing by looking from a strategic vantage point and by considering the many influences that can be brought to bear in forging a contemporary social marketing fit for contemporary conditions in a different nation geographically distant from the UK and the US.

As noted above, New Zealand's only dedicated social marketing agency, the HSC, had adopted a definition of social marketing that acknowledged the physical, social and economic environments in which people live (HSC, 2004). Engaging with key aspects of soul, the HSC described social marketing as the use of marketing principles and techniques to benefit individuals and society, helping create environments that supported behavior change. It identified key features of social marketing as a consumer focus, voluntary behavior change and research-led activities that targeted different market segments and used the marketing mix.

Accordingly, at the conscious introduction of social marketing in New Zealand, and in the first social marketing publication (HSC, 2001), the marketing mix followed the traditional 4Ps of product marketing: Product, Price, Place and Promotion. New Zealand practitioners,

however, situated the imported mix alongside the Ps of partnerships and policy as well as other activities. The later HSC (2004) delineation of the marketing mix began to deviate most visibly from “pure” marketing thinking to social marketing crossed with PR practices by revising their mix with the addition of a further two Ps: Policy and Partners. As these are such core concepts in PR, it follows logically that these additional areas result from the influence of PR practitioners and PR thinking (with some input from the public health sector).

This acknowledgement of the place of social marketing in creating healthy public policy was ground-breaking at the time. It predated the much-vaunted Andreasen (2005) proposal of the three levels of marketing practice that were taken up by Kotler and have since come to occupy almost iconic stature (French & Gordon, 2015, pp. 28–29). Indeed, when Andreasen presented his thinking at a World Global Marketing Conference, New Zealand’s leading social marketer, Tracey Bridges, recognized that this was the social marketing thinkers finally incorporating PR within their approach. The focus on different audiences, accompanied by the adoption of language and techniques from PR, which was present in New Zealand social marketing almost from the outset, did not enter the global arena until around 2011. The importance of PR in effective social marketing was further boosted by Kotler’s identification of the third key stage of social marketing focused on organizations and institutions, which “play an important role in supporting an undesirable or that can play some positive role in supporting the desirable behaviour” (Dibb & Carrigan, 2013, p. 1381).

Both public health and PR focus strongly on working with organizations, communities and other stakeholders. This comes through in the final P for Partners, although that may partly be a result of the disparate nature of the New Zealand health system. The HSC and other agencies needed to work with other organizations to achieve goals, extend budgets and deliver effectively. While the use of the 6Ps in social marketing is not unique to

Aotearoa, its early national adoption links to the influence of PR in establishing the discipline in New Zealand.

The task of separating out the role of public relations in past social marketing programs, however, is difficult. For instance, in their report on NZ youth-focused social marketing, Thornley and Marsh (2010) largely describe the mass media advertising of the campaigns they consider. Within social marketing, promotion is the last and most visible element of the marketing mix. Many New Zealand social marketing practitioners position this focus on mass media advertising as social advertising not social marketing, which is understandable since grasping the elements involved in a social marketing program from the outside is difficult and the most visible elements are often mass media advertising. We suggest that without an understanding of how the other elements – including PR activities – of the program have been used, we cannot fully understand if social marketing is happening and if it is effective. Indeed, Lee and Kotler (2011) argue that the mix is most important and without consideration of all elements of that mix, many campaigns fail. However, with the disestablishment of the HSC in 2012, their thought leadership in New Zealand social marketing disappeared too. There was no central hub for social marketing and specific skills, tacit knowledge and team experience appears to have been lost with it.

The disestablishment of the HSC followed a change in government in New Zealand in 2008 but the political aspects are a whole other dimension that require different research. At this stage it is enough to say that the election of a new government in 2017 enabled social marketing to re-emerge. Unfortunately, in the re-emergence, the 4 Ps of the marketing mix have again come to dominate social marketing, and the world leading practices of the early 2000s have largely been lost. However, as the limitations of the marketing mix also resurface through social marketing's increased focus on the consumer and upstream approaches, the

time may be right to revisit the public relations-inspired mix of New Zealand's early social marketing. Although further scrutiny is needed as we move further into Kotler's fourth key stage of social marketing, which focuses on social change and individualized communication channels, the skills and focus of the PR discipline can continue to play an important role in future social marketing. Indeed, it is over five years since Matthew (2012) noted that commercial marketing had long since moved away from this simplistic [4 Ps] approach and "a tendency to adopt outdated, irrelevant theories... does not help social marketing establish itself as an important and unique discipline" (p. 98). The alignment of all these elements make this a propitious time to bring a strategic PR focus into social marketing in New Zealand. So, despite the messy and uneven development of social marketing in practice, the New Zealand evolution narrative tends to support scholarly identifications of the present as a good time for considered intersections between PR and social marketing.

### **Developments in social marketing**

As with commercial marketing, social marketing needs to move away from the idea of advertising-centered campaigns and towards a focus on building relationships with a PR approach. This focus becomes even more important in a time when social media are so central. The move offers opportunities for social marketing to learn from the core skills of PR but social marketing seems to have missed the advances beyond the 4 Ps despite Hastings (2007) reminder that "the behaviours social marketers want to change have multiple influencers" (p. 131). The continued use of a 4 P based marketing mix developed before social marketing emerged, is thus increasingly problematic. This will come under further scrutiny in Kotler's fourth key stage of social marketing with its focus on social change and individualized communication channels.

French (2017b) argues that definitions of social marketing have been used to establish criteria for social marketing. However, these criteria are a mix of principles, concepts and techniques. He suggests that understanding the essential nature of social marketing requires a hierarchical relationship between principles, concepts and techniques. French (2017b) suggests a single core social marketing principle: “Social value creation through the exchange of social offerings (ideas, products, service, experience, environments, systems)” (p. 21). This fits well with Adler and Jermier’s (2005) soul scholarship as well as providing space for various disciplines to come together under the banner of social marketing. Under this core principle, French (2017b) suggests four social marketing concepts: Social behavioral influence; Citizen/civic society focus; Social offerings; and Relationship building. This revised thinking also challenges the traditional view of public relations within the social marketing academy. Public relations has been seen as a promotion option (Cheng et al., 2011; Lee & Kotler, 2011) rather than a strategic and relationship dimension. This is a misunderstanding that matters. It is time for social marketers to understand the strengths and purpose of PR and for PR practitioners to understand the strengths and purpose of social marketing. Indeed, the writers of textbooks within the two disciplines demonstrate little understanding of the core principles and concepts offered by the other. The four concepts in French’s (2017a) collection provide space for marketing, public relations and other social change practices to inform strategy and thus the next step in the hierarchy – social marketing technique.

Underneath the core principle and four concepts, French (2017b) positions four core social marketing techniques: “Systemic and systematic planning and evaluation and integrated intervention mix”; “Competition analysis and action”; “Insight-driven segmentation”; and “Co-creation through social markets” (p. 23). Moving away from the 4 P

driven marketing mix in this way, French (2017b) provides space for marketers and PR practitioners to come together in a combined social marketing with more soul. The strengths of marketing in its citizen focused, data-driven focus on exchange complement PR's focus on partnership, engagement and the big picture.

### **New Zealand's influence on social marketing**

Our journey's focus on the introduction of social marketing in Aotearoa suggested that the early New Zealand experiences offered a broader focus than practice elsewhere. French's (2017b) hierarchical model of social marketing resonates effectively with the strengths inherent in those early approaches. The influence of PR and health promotion on social marketing has effectively produced a discipline that can – if the lessons are shared – learn from all comers. However, New Zealand has one unique contribution to bring to social marketing and it is informed by the nation's founding document, Te Tiriti o Waitangi<sup>6</sup> (1840). Te Tiriti, signed between the Crown and some hapū (tribal) leaders in 1840, consists of three articles focused on tino rangatiratanga (self-determination), kawanatanga (governance) and oritetanga (equity). Within New Zealand government bodies, these articles are often reduced to three treaty principles: partnership, participation and protection. Social marketing in New Zealand was thus launched in an environment in which agencies were required to consider:

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<sup>6</sup> We use Te Tiriti o Waitangi or Te Tiriti when referring to the Treaty of Waitangi to acknowledge the original version in te reo Māori rather than the English translation made at the time. Subsequent translations have highlighted key differences between the two 1840 documents

- Partnership: working with Māori to develop approaches to improve Māori health [or other aspiration, such as, educational achievement, economic participation...]
- Participation: involving Māori at every level of planning and delivery
- Protection: working to ensure Māori have the same level of health [or other outcome] as non-Māori (Ministry of Health, 2014).

The articles of Te Tiriti and the associated principles place a social justice agenda on state-funded social marketing. The rights and needs of indigenous (and other groups) need to be addressed not only in the final delivery of the program but also through active partnership and on- going participation. Thus, relationship building, a key component of PR practice is embedded within a New Zealand approach to social marketing.

Judging the success of social marketing within this framework also demands that outcomes are delivered that level the playing field – that lift the status of disadvantaged groups. As an example, New Zealand has a history of poorer health outcomes for Māori (Ministry of Health, 2015), making hauora Māori (Māori wellbeing) a particular issue when health outcomes in New Zealand are viewed through the lenses of Te Tiriti o Waitangi. This means that social marketing has adopted a focus on changing environments as well as on individual behavior change, and positions Māori as active partners in developing programs that impact them. The Ministry of Health has illustrated how Te Tiriti translates into health promotion practice and the same can be assumed of social marketing. That is to say that: Māori health has the highest priority and Māori concepts of health are recognized in program planning, Māori have control over their own health and access to resources, and Māori are empowered to fully participate at every level, and programs are designed to be responsive to Māori needs (Ministry of Health, 2002).

**Where to from here?**

Public relations and social marketing already intersect. Yet there is still much for the two disciplines to learn from one another – both strategically and operationally. Together they offer an opportunity to deliver programs that benefit individuals and societies. However, achieving practice with soul will require change, preparation and thought. A good starting point would be when considering how we prepare practitioners and ensuring appropriate opportunities are available to them. It should continue by also including how we plan, deliver and evaluate programs, and how we build the reputations of both disciplines collectively.

**Training and employment for practitioners**

How do we prepare the workforce? In small countries, like New Zealand, social marketing and PR teams are often small. Indeed, many programs are overseen by a single member of staff who is responsible for a range of PR functions as well as the delivery of social marketing campaigns and/or programs. These staff members therefore need to be skilled in both traditional social marketing and PR and yet the opportunity to develop the two skill sets are lacking in many of our education programs. Coordination will be required so that, for example, universities engage with government and non-government agencies to understand the evolving needs of the sector, particularly as evidence from other parts of the world suggests social marketing and other citizen-focused behavior change programs are becoming embedded within our societies (French & Gordon, 2015).

For PR practice, this means evolving beyond a focus on issue awareness or size of media coverage and moving towards delivering measurable behavioral outcomes in PR itself and within broader social marketing programs. It also means developing practitioners with an understanding of behavior and behavior change, as well as integrating social marketing theory and practice into PR education programs. Looking at the transfer from the other side,



PR theory and practice is needed within social marketing programs: social marketing practitioners need to understand relationships and their power, how to influence at a political level and how to engage audiences through PR tools. In addition to making themselves more marketable, practitioners with the skills of marketing and PR will be better prepared to engage on social issues and develop and implement programs that influence at every level. This will ultimately benefit society.

### **Evaluating our practice**

In the 1990s, social marketing moved from a focus on changing ideas to changing behavior (Andreasen, 2006; Dibb & Carrigan, 2013). This, we argue, remains the most important lesson that social marketing brings to PR. It is not enough to communicate messages, get media coverage and influence ideas, we must seek to change behavior. In addition, that change must be measurable if we are to be judged successful. In New Zealand for example, the *Evaluation Standards for New Zealand* (Social Policy Evaluation & Research Unit, 2015) describe evaluation as a range of activities to determine the value, quality and importance of something. Specifically within social marketing, evaluation “assesses whether a programme has been implemented according to plan and the degree to which it has met its goals and objectives” (Stead & McDermott, 2011, p. 193). Evaluation provides an opportunity for funders to be assured of credibility, improvements to be made throughout a program, decisions to be made around adjustments to the techniques used, the actual outcomes to be assessed and future interventions are able to learn from past programs (Stead & McDermott, 2011) and in social marketing terms to improve some aspect of the real world.

As Andreasen (2006) argues, social marketing has a role in agenda setting in public, political and media arenas. This cannot be done through a downstream focus on individual

behavior change. The advocacy and engagement skills of PR practitioners have a very real role in effective and comprehensive social marketing. This too needs to be measured, how is social marketing changing the opinions and behaviors of politicians, decision-makers, journalists and the wider public? Andreasen (2006) further argues the need for a dual focus in social marketing, with upstream approaches focused on decision-makers and leaders (i.e., a PR approach, and downstream approaches focusing on individual behavior change. He notes that a focus on individual behavior change alone can stigmatize the target audience in a traditional social marketing approach. Indeed, he states that “it is unfair to expect the individual to act, even if he or she is motivated, because *barriers* in the environment external to the individual make it difficult or impossible to act” (Andreasen, 2006, p. 74).

Evaluating the success of social marketing programs, and the impact of PR on them, means thinking about evaluation and making it an integral part of any program. As Crosier and McVey (2017) note, “the lack of good-quality evidence is a persistent theme that informs debates about evaluation of social interventions, including social marketing and behaviour change programmes” (p. 49). Any summative evaluation needs to focus on not just the target audience but also the other groups impacted by the program. In contrast to many current evaluations, the outcomes must be distinguished from outputs – practitioners should focus on demonstrated behavior change not number of people reached nor the visibility of events held (see French, 2017a). To take advantage of French’s (2017b) hierarchical model of social marketing: we need to consider how the program has increased social value or decreased social problems, and to look at the techniques used and their impact – particularly in checking how behavioral objectives have been met. While Lee and Kotler (2011) note that both behavioral and awareness goals may be appropriate within a social marketing plan,

Andreasen (2006) rightly observes that these secondary/awareness goals alone should not be used as a measure of success. Social marketing programs exist to influence behavior.

Returning to the lessons of New Zealand and the lens of Te Tiriti o Waitangi (1840), there is more to a successful program than the raw numbers of behavior change. The principles of partnership, participation and protection must also be considered. How have Māori and other at-risk groups been partners in the program; how have they participated in the planning, delivery and evaluation; and what kind of equity has been achieved? For example, the two disciplines' claims of success in introducing smoking reduction to women features in both the marketing and PR literature and yet scant attention has been paid to Māori women. New Zealand celebrates success in reducing tobacco smoking and a target of fewer than 5 percent of New Zealanders smoking by 2025 has been set (Health Promotion Agency, 2018). Can twenty years of tobacco-focused social marketing lay claim to success? As well as society as a whole becoming healthier, individual lives have been improved through going smokefree, and smokefree homes, clubs and workplace initiatives have created healthier environments, in addition to relevant policy changes (plain packaging, pack size, excise tax, etc).

Despite these markers of success, clear limitations exist in terms of failing to include the treaty principles and to keep a focus on equity and social justice. Māori women's smoking rates are currently around 34 percent (Broughton, 2018), much higher than the general population rate of 13 percent. In measuring success, we must take in many facets, and cannot afford to ignore measures of failure when lives are at risk. Accordingly, evaluation needs to consider whether a program has: involved appropriate partnerships and participation; raised social value or decreased social problems; impacted positively on the target groups (including changing their behavior); and decreased inequities for those most at risk.

**The intersection revisited: Social marketing, three major issues in PR and pure soul**

Three major and ongoing issues for PR are: employment for practitioners, evaluating outcomes and social reputation. In discussing the intersection, McKie and Toledano (2008) proposed that: “if social marketing is to avoid a marginal position on the fringe of marketing in education, then sharing the PR educational dowry may offer an attractive option” (p. 324). Although, from the perspective of 2019, social marketing has, as charted above, established a distinctive niche of its own, it has still to deal with familiar marketing overtures in the familiar imperial tone: “Social marketing should rightly be considered part of the marketing mainstream. Rather than debating whether the field is actually part of marketing, academics need to accept this fact and move forward to handle the challenges it brings” (Dibb & Carrigan, 2013, p. 1376). There are two further prominent social marketing assets for PR. The first arose: “because the need to address major social problems through behavioral change is growing, there will be increased graduate employment opportunities to do such worthwhile work” (McKie & Toledano, 2008, p. 324). This remains a vital issue for jobs for practitioners as well as for answering calls for change with impact and robust evaluation outcomes.

Social marketing’s final asset is its association with soul in action and soul scholarship. This varies from Basil’s (2007) view that “As both a practice and a field of academic study, social marketing is a process tool” (p. xxi) to Hastings’ (cited in Dibb & Carrigan, 2013) explicit call to social marketers to engage with “two major threats – corporate power and anthropogenic climate change” and to pick up “one dauntingly ambitious opportunity: empowered social change” (p. 1388). The promise of the latter kind of environmental and social engagement offers possible pathways to retrieving PR’s reputation from being one of the “dark arts” (Burt, 2012, p. 202). Two further reflections arise from

revisiting the intersection. The first is the significant but rarely considered difference that PR has no “social PR” equivalent to social marketing and the second looks at recent social marketing scholarship to suggest how lack of knowledge of may be holding back not just PR’s capacity for soul in content but can dispel some of the vagueness surrounding what is involved in satisfying the search for soul in general.

For the first, many notable social marketers (e.g., Hastings, 2012) continue to struggle to avoid being integrated into commercial marketing. In contrast in PR, despite the substantial growth in critical PR (L’Etang et al., 2015), no one has theorized the large sector of the field that, with a focus on campaigns, might be classified as non-business, non-corporate PR. It could be captured under a common umbrella identity of non-commercial, or social PR. Many of its campaigns – especially by community PR and non-profit PR practitioners – are strongly prosocial and pro-environment but are not integrated into a common social PR movement with an equivalent enactment agenda to social marketing. For the second, we consider relatively recent, mature and thorough social marketing scholarship on soul that doesn’t just involve methods and outcomes but goes beyond them in striving to build the foundations for a broad theoretical and practical consensus.

This involves these scholars in asking hard questions and probing more deeply into how much social marketing is pure soul. For example, while social marketers may consistently mean well – and clearly do more for public health with smoking programs than commercial marketers who promote tobacco products – Holden and Cox (2011) still ask if there is anything about social marketing “that makes it inherently ethical?” (p. 59). The obvious answer is usually the content and different ends of their endeavors but, for them, “what constitutes the social good” (p. 59) nevertheless remains “difficult to determine and. . .

[is] often contested” (p. 59). Taking immunization as a case, Holden and Cox (2011) argue that the problem:

is that what is good for the individual does not necessarily align with what is good for the community. Individual preferences may be subjective but are nonetheless deemed important from an ethical point of view. It is noteworthy and ironic perhaps that commercial marketers are probably more sensitive to individual preferences than social marketers. (p. 67)

They conclude that the “hope” of protecting “social marketers from hubris and to encourage vigilance against inadvertent engagement in unethical behaviour” (Holden & Cox, 2011, p. 71). This is a conclusion worth spreading beyond social marketing and a literature of value to PR. Finally, as social marketing strives to resist absorption by commercial marketing, so too, we argue, should activist, community, nonprofit and other prosocial PR resist the pull – perhaps by developing their identity as social PR – to be implicitly or explicitly under the banner of corporate PR. By standing apart from corporate PR and commercial marketing, yet standing together in the search for soul, both fields can achieve more in terms of employment and soul and access better opportunities than standing alone.

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## **CHAPTER 6: DECOLONISING SOCIAL MARKETING: INDIGENOUS KNOWLEDGE AND NZ PRACTITIONER EXPERIENCES**

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*This article was submitted to an industry journal in April 2021. The paper was reviewed by two social marketing experts with substantial understanding of social marketing within indigenous contexts. The reviewers and the journal editor felt that this was an important topic that needed to be at the forefront of the field. The feedback identified the need to focus specifically on Māori experience rather than attempting to address wider indigenous experience. The particular role of Te Tiriti (discussed) below makes the experience of New Zealand Māori unique.*

*The paper is now being reworked with Māori colleagues from the university and the sector to incorporate Māori concepts into a conceptual paper that positions the issues raised within the original paper more firmly within the social marketing community.*

### **Abstract**

#### **Purpose**

This paper synthesizes New Zealand (NZ) practitioner experiences of working with indigenous peoples (Māori) with developments in the social marketing literature to suggest ways of engaging more inclusively and effectively with indigenous peoples.

## **Approach**

The research draws from the emerging recognition of the relevance of indigenous worldviews, a review of key NZ documents and appreciative inquiry-based interviews with experienced NZ social marketers.

## **Findings**

There is support for social marketing, especially given its shift in focus away from individual behaviors onto upstream interventions, as a valuable tool for addressing indigenous health disadvantages. This paper argues for extending that shift to encompass the worldviews of indigenous people – especially their interconnectedness with one another and the planet – and supports calls for a systems approach to change. It concludes that by decolonizing social marketing concepts, practice and outcomes, social marketers can increase their effectiveness for indigenous people.

## **Originality**

Despite calls for diversity of culture in social marketing, little attention has been paid to the use of social marketing to address indigenous disadvantage. The paper begins to address this gap through linking developments in the social marketing literature with the experience of social marketers and their work over a stretch of time with Māori.

## **Research limitations/implications**

Although the interviewer covered almost all of NZ's leading practitioners, the total number of interviews was relatively small. Moreover, the paper did not attempt to focus on the experiences of the indigenous populations in other countries because differences in culture, history and language are so critical (Mamo, 2020).

## Introduction

Several countries have used social marketing to address health disadvantage for their indigenous peoples (Glass and Giles, 2020; Kubacki and Szablewska, 2019; Madill *et al.*, 2014). In Aotearoa New Zealand (NZ) the practice has been part of the health improvement landscape since the 1990s (Antric *et al.*, 2021) and while social marketing has been used to address indigenous health disadvantage over two decades – there is little evidence of impact. Overall, this paper seeks to bring together this expert knowledge from practitioners with recent international social marketing literature to identify lessons for social marketers working with Māori – the indigenous people of Aotearoa New Zealand (NZ<sup>7</sup>) who comprise 16.7% of the population. In addition, it aspires to contribute learning that will be of value to indigenous peoples and social marketers engaging with inequitable health outcomes elsewhere.

In analyzing the potential for a decolonized social marketing that can embrace alternative epistemologies and ontologies, we draw from two main sources. The first comes

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<sup>7</sup> We use Aotearoa New Zealand in recognition of the two groups that call these islands home: tangata whenua – the indigenous peoples, commonly referred to as Māori – and tangata tiriti – the peoples for whom Te Tiriti o Waitangi (New Zealand's founding document, the Treaty of Waitangi) established their right to live here. We do this to recognize the two cultures that formed this nation and the challenges and strengths this has created. Any reference to NZ should be seen as a recognition of Aotearoa and New Zealand.

out of the experiences and reflections of practitioners working with Māori; the second aligns the first with recent calls for diversity of culture and experience (e.g., Kassirer *et al.*, 2019) within the social marketing literature and associated appeals for “an applied framework of decolonization” (Chandanabhumma and Narasimhan, 2020, p. 831) in health promotion.

There is scant academic research around the use of social marketing to improve indigenous outcomes. However, in the wake of the Black Lives Matter movement, there has been a call for social marketing to address racism (Grier and Poole, 2020) and an associated increase in attention on the decolonization of marketing thought and action. There is also increasing focus on indigenous leadership within the linked discipline of health promotion, as evidenced at the 2019 International Union of Health Promotion and Education conference in Rotorua, NZ.

Our paper signals the need for indigenous-focused social marketing to build on the worldviews and knowledge of both the academy and indigenous nations. It signposts a journey toward more effective and inclusive practice. We draw on the first author’s own practical experience, alongside interviews with senior practitioners and literature from social marketing and indigenous studies to argue for approaches to social marketing that integrate indigenous paradigms.

### **Literature review**

The scholarly literature situates social marketing as an established approach to achieving individual and social change through the use of marketing principles and techniques (Dann, 2010; Dibb and Carrigan, 2013; Hastings *et al.*, 2011; Lee and Kotler, 2019). While Dann (2010) identifies more than 40 definitions of social marketing, he notes that these definitions are based around an English-speaking Western worldview. Social

marketing is a Western tool built on Western ontologies, epistemologies, science and practices. The voices of non-Western communities are few or absent within the literature and within the academic community (Gordon *et al.*, 2016; Kassirer *et al.*, 2019). While there has been increasing critique of this in the discipline, change is needed if social marketing is to be successful in advancing health and other social outcomes (Gordon *et al.*, 2016) among indigenous and other non-Western communities. More recently, the literature and the social marketing associations have called for diversity of culture and ideology within the field (Kassirer *et al.*, 2019). However, in the context of social marketing, the topics of indigenous health disadvantage and indigenous ontologies, epistemologies and practices have rarely been investigated.

### **Indigenous disadvantage as a wicked problem**

It is timely then to explore the significant cultural differences and the need to decolonize practices if we are to solve what Kennedy and Parsons (2012) call the “wicked problem” of indigenous disadvantage (i.e., inequities between indigenous and majority populations). Despite ongoing efforts to address the issue, the experience of indigenous disadvantage goes beyond any one nation (Gone *et al.*, 2019; Reid *et al.*, 2019). The Australian Public Service Commission (2012) also characterizes indigenous disadvantage as a wicked problem and follows Crowley and Head (2017) in describing wicked problems as issues that are complex, longstanding and difficult to solve. In NZ the Waitangi Tribunal, a permanent commission of inquiry into the actions of the Crown that breach NZ’s founding



treaty Te Tiriti o Waitangi<sup>8</sup> (1840), released a report on health services in 2019. It identified indigenous people in NZ as continuing to have the worst health outcomes of any group and concluded that the Crown had failed to partner effectively with Māori to improve these outcomes (The Waitangi Tribunal, 2019).

Outside of NZ, but similarly identifying indigenous disadvantage as a wicked problem, Lefebvre (2013) argues that social marketing provides a framework to address it. Others (Basil *et al.*, 2019; Hoek and Jones, 2011; Kennedy and Parsons, 2012) echo his view and add that the complexity of wicked problems also requires a systems perspective to address all the forces at work within societies, communities and individuals. In the words of Carvalho and Mazzon (2019): “There is a need for a discipline capable of identifying the systemic drivers of complex social problems and promoting solutions” (p. 74). Raciti (2020) goes further in contending that indigenous thinking, with its focus on the inter-relationships between people, the planet and the past, brings a systems focus to social marketing that can be used to address wicked problems.

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<sup>8</sup> We use Te Tiriti o Waitangi or Te Tiriti when referring to the Treaty of Waitangi to acknowledge the original version in te reo Māori rather than the English translation made at the time (*The Treaty of Waitangi/Te Tiriti o Waitangi*, 1840). Subsequent translations have highlighted key differences between the two 1840 documents.

In *Social Marketing: The State of Play and Brokering the Way Forward*, Gordon *et al.* (2016) acknowledge the field's ethnocentrism and ask the related question: what qualifies as evidence. Despite their calls for diversity, they then discuss this question from an entirely Western perspective without taking account of indigenous academic, Sir Mason Durie's (2005) point that: "Indigenous knowledge cannot be verified by scientific criteria nor can science be adequately assessed according to the tenets of indigenous knowledge. Each is built on distinctive philosophy, methodologies and criteria" (p. 301).

### **Social good, social marketing and indigeneity**

The notion of "social good" is increasingly positioned at the heart of social marketing in alignment with the Universal Declaration of Human Rights (UN General Assembly, 1948). In social marketing, it is frequently cited as a focus for thought and action (Carvalho and Mazzon, 2015; Gordon *et al.*, 2016; Kassirer *et al.*, 2019; Szablewska and Kubacki, 2019). However, indigeneity is not addressed within the declaration, even though the UN General Assembly (2007) further declared the need to embrace this (and include recognition of indigenous cultures, practices and experiences of colonization). The growing movement to consider social good as a core tenet of social marketing, goes beyond Andreasen's (2001) cautious approach to the role of social marketing as colonizing the thinking and behavior of a target audience. It expands the purpose of social marketing to explicitly include improving social outcomes.

To date, however, the literature on social marketing for indigenous health improvement is sparse: the *International Social Marketing Conference "Broadening Cultural Horizons in Social Marketing"* (Hay, 2018) did not include any cases of indigenous social marketing; *Social Marketing in Action: Cases from Around the World* (Basil *et al.*, 2019)

similarly exclude them; and indigeneity was not identified in *Taking the Pulse of Social Marketing: The 2019 World Social Marketing Conference* (Veríssimo, 2020). Among the few exceptions, Kubacki and Szablewska (2019) and Madill *et al.* (2014) identify that social marketing has been used to address health issues faced by indigenous people. Based on the studies they reviewed, both sets of researchers conclude that targeting indigenous peoples' health means addressing different cultural values, attitudes and norms, different approaches to knowledge distribution, and meaningful engagement with community leadership. In addition, the authors highlight the need to focus on the collective rather than the individual and concur with Durie's (1998, 2001) classic acknowledgement of the diversity of indigenous experience. Moreover, Kubacki and Szablewska (2019) observe that, with few exceptions, the majority of published literature does not include theoretical frameworks. One notable exception is the 1996 Canadian Royal Commission on Aboriginal Peoples which is informed by decolonization theory and acknowledges the impact of colonization.

Reece (2020) contends that evaluating the effectiveness of social marketing for indigenous peoples requires a critical analysis of social marketing from an indigenous perspective. In NZ, for example, this requirement is addressed by what has been called a Kaupapa Māori analysis, with an expectation that relevant research is done by Māori, with Māori, and for Māori and is informed by tikanga Māori, or Māori ways of doing things. As Severinsen and Reweti (2019) report, this led to evaluations of Māori programs that called for such outcomes as “whānau [multi-generational kinship groups] self-management, healthier lifestyles, increased community participation, increased resilience, and increased participation in te ao Māori [the Māori world]” (p. 292). As well as broadening the focus of most social marketing programs in NZ, the use of Kaupapa Māori analysis would lessen the

risk of social marketers placing “themselves in the position of imposing their values on those targeted” (Andreasen, 2001, p. 45).

Lefebvre (2001) identifies the most frequent behavior change models in social marketing as: health belief model; theory of reasoned action; social cognitive theory; transtheoretical (stages of change) model of health behavior change; and diffusion of innovations. Subsequently, Davis *et al.* (2015) identified more than 80, although many overlap significantly, individual behavior change models. All of them rest on Western knowledge, and all have a focus on the individual and their agency. As Dutta-Bergman (2005) of the *Center for Culture-Centered Approach to Research and Evaluation* notes, the Western notion of the individual has been the object of theory development. However, as indigenous academic Professor Linda Tuhiwai Smith (2012) observes, the very notion of the individual person is a construct of Western philosophy along with the separation of mind and body. This is not the same in indigenous collective cultures (such as Māori) where individual behavior reflects the collective. As Love (2004) argues, the indigenous concept of self is distinct from Western perspectives – the individual can only be understood through their social and cultural relationships. This distinction aligns with Durie (1998), who notes how the Western ideal of independence is at odds with the indigenous sense of interdependence and connectedness.

### **Decolonizing social marketing and foregrounding indigenous culture**

Recent social marketing literature has identified culture, and, especially indigenous culture, as a neglected area. Looking outside the discipline, reality, as others (e.g., Smith, 2012) argue, is culturally bound. This has significant implications for practice. Within the related discipline of health promotion, Griffiths *et al.* (2009) and Durie (1999, 2019) have

made calls to embrace indigenous knowledge, while delegates at the 23rd annual conference of the *International Union of Health Promotion and Education*, identified colonization and neoliberalism as “urgent challenges of our generation” (Gagné and Lapalme, 2019, p. 378). These calls for action fit with Chino and DeBruyn’s (2006) contention that indigenous disadvantage is the result of systemic failures by institutions rather than poor choices by indigenous people. Their perspective finds recent support in Chandanabhumma and Narasimhan’s (2020) appeal for practitioners to address these colonial legacies and their associated erasure of indigenous ways of improving and maintaining health. They further contend that current paradigms need to be reviewed and rethought; social marketing needs to be decolonized.

At this point, we wish to clarify that, while postcolonial theory is used to examine the outcomes of colonization (Jack *et al.*, 2011), the term “postcolonial” appears to position colonization as something in the past. Smith (2012) identifies how this is not the case and others confirm that colonization is a real and current experience for indigenous peoples (Muriwai and Glover, 2016). This is further acknowledged in the findings of recent reviews of the NZ health system (Health and Disability System Review, 2020; The Waitangi Tribunal, 2019). We therefore focus on how decolonization practices foreground, and sometimes privilege, indigenous epistemologies and ontologies (Chandanabhumma and Narasimhan, 2020).

Social marketing, as Raciti (2020) observes, can act as a thought disruptor capable of addressing systemic power and privilege issues and so open up opportunities to address indigenous disadvantages. Even in mainstream marketing, in the wake of the Black Lives Matter movement, discussion of the decolonization of marketing thought and practice has begun to emerge (Hyman and Shabbir, 2020). Social marketing, in line with all marketing,

needs to concern itself “with challenging marketing concepts, ideas and ways of reflection that present themselves as ideologically neutral or that otherwise have assumed a taken-for-granted status” (Tadajewski *et al.*, 2011, p. 83). Decolonizing social marketing is one means of doing this: “opportunities exist to increase the effectiveness of social marketing interventions through the use of Indigenous theories and research methods and methodologies” (Kubacki and Szableska, 2019, p. 142).

Indigenous approaches challenge the notion that there is “any automatic or assumed ‘rightness’, ‘naturalness’ or dominance of Western ways” (Love and Tilley, 2014, p. 41). For example, at the core of Māori identity is whakapapa (inter-relationships with people, the land and its history) and this is expected to be recognized in models of practice. That said, the disruption to these connections through colonization must be noted. In contrast to the indigenous experience, as Thomas (1995) observes, Western psychology is built around the individual as a self-contained and self-sufficient being. Models used in designing social marketing programs for Māori are largely focused on individuals as in Bethune and Lewis’ (2009) use of the health belief and transtheoretical (stages of change) models. Elers (2016), while acknowledging that there is no empirical evidence to support this, suggests that Māori health models offer utility for social marketing planning.

Despite Durie’s (2005) conclusion that indigenous knowledge and Western knowledge have incompatibilities, NZ scholars have suggested that they can be brought together to create practices with the strengths of both (Hudson *et al.*, 2012; Macfarlane and Macfarlane, 2019). The NZ Health and Disability System Review (2020) states that, although greater efforts are needed, indigenous knowledge and practice has increasingly been integrated into the NZ health system over recent decades. This integration has included consideration of kinship groups, culture, tribal connection, language, customs and access to

traditional lands and spaces (Health and Disability System Review, 2020), along with use of Māori models of health (Durie, 1982; Pere and Nicholson, 1991) and health promotion (Durie, 1999, 2019; Ratima, 2010), traditional healing practices, indigenous values within governance, treatment and administration (Health and Disability System Review, 2020). We did not identify this at a similar level in other similar countries although we note that the indigenous populations make up a far smaller percentage of the total population in Australia, Canada and the U.S.A., and their indigenous populations are made up of distinct language and cultural groups (Mamo, 2020) challenging any ability to take a cross-national approach.

While Farmer *et al.* (2018) found that Durie's *Te Whare Tapa Whā* (The Four-Sided House) Māori model was frequently used within the NZ health system, we note that it aligns well with Western models of holistic health encompassing social, physical, mental and spiritual dimensions. Although not accurately reflecting their Māori paradigm, the Māori concepts that underpin these models are often diminished to fit the Western discourse on health. For example, as Heaton (2018) defines it, *hauora* – the most common translation of health or wellbeing used across the health sector – has a wider reference to:

the supernatural hau (breath) of ora (life) given to Hine-ahu-mai-i te-one (the first feminine form). Hau (wind or vital essence of life), ha (breath), ora (to be alive, healthy, to survive) and wairua (spirit) were infused into the first feminine form, the progenitor of humanity to animate life. (pp. 461–462)

In contrast to Durie's model, other NZ indigenous models of health such as *Te Wheke* (The Octopus) (Pere and Nicholson, 1991) and *He Pou Oranga Tangata Whenua* (Māori Determinants of Health) (Te Rūnanga Hauora Māori o Te Moana ā Toi, 2007), which do not fit so well with Western concepts have had less success within the health system. Both of

these models include interwoven cultural constructs that are hard to translate to an English-speaking viewpoint.

Social marketing has been identified as capable of taking a systems approach to the wicked problem of indigenous health disadvantage. It must, however, align with indigenous knowledge as in Raciti's (2020) call for social marketers to "foreground the wisdom of First Nations Peoples... as the original systems thinkers" (2020). She concurs with Māori scholars in recognizing the interconnectedness and full richness of social phenomena within indigenous thinking compared to the reductionist thinking common in the dominant paradigms. For Raciti (2020), this kind of interconnected systems thinking based on indigenous norms can lead the transformation of social marketing. We therefore frame our research question as: *Can lessons about effective approaches to the wicked problem of indigenous health disadvantages be taken from the NZ social marketing experience?*

### **Research approach**

The research is based on data collected from in-depth and semi-structured interviews with 20 experienced social marketers in NZ, a review of key documents and literature, as well as the first author's (FA) experience and insights. Given the small size of the NZ social marketing community, it was possible to interview almost all the relevant sources of information. Interviewees were selected from a list of consultants and practitioners who worked for government and non-profit organizations. All interviewees had extensive experience working on social marketing programs that included Māori as a priority audience. The small size of the local social marketing community enabled easy identification of potential interviewees by their peers via snowballing.



The FA's observations are built on 20 years of personal and professional experience within Māori cultural settings, and active involvement in social marketing and population health in government, non-government and agency settings. This enabled an insider privileged access to information and people, enhanced credibility as interviewer, and a familiarity with the context, the work and the people. In addition, the FA undertook personal self-reflection (Chang, 2016) as part of this project.

The interviews were conducted between May and June 2019 following ethical approval from the affiliated university. Five interviewees identified as indigenous while 15 were NZ European; seven were male and 13 were female. To protect confidentiality, we refer to participants by numbers (e.g., #20) and avoid detailed description of professional affiliations. We also use quotes from specific interviewees to demonstrate frequently-mentioned responses by other interviewees.

Given the need to gather rich data, the project used appreciative inquiry (Cooperrider *et al.*, 2008; Whitney and Trosten-Bloom, 2010). The aim was to encourage the participants to share freely and reflect openly with the interviewer, and to foster meaningful description and analysis in their own words. The project focused on producing knowledge through a focus on "strengths, successes, values, hopes and dreams" (Whitney & Trosten-Bloom, 2010, p. 1). The interviews were guided by a questionnaire that included questions about the effectiveness of different social marketing approaches in achieving positive health outcomes for Māori as well as questions about the unique aspects of social marketing in NZ. All interviews deployed similar questions and approaches and encouraged follow up with participants that developed an open conversation on the topics raised in the interview.

The researchers analyzed the interview transcripts thematically using open coding techniques. They also used supplementary documents, including participant publications, government materials and media articles, to validate the personal memory data and stories told by interviewees. As Muncey (2010), who as nurse, psychologist and autoethnographer, notes, no-one lives in a disconnected world. We live in a point in time, in a specific space, surrounded by groups of people. Accordingly, we, the authors, acknowledge our own status as *tauiwi* (immigrants to NZ).

### Findings

From analyzing the interviews and other sources the research identifies a wide and growing recognition of the potential of social marketing to address indigenous disadvantages, albeit with interviewees foregrounding the need to move beyond individual behavior change to address issues at political and systemic levels.

The participants consistently observed that the term “social marketing” was often misconstrued and applied to advertising campaigns rather than a “grounded, fully comprehensive program that includes all the things that make social marketing successful” (#15). The literature also identified that social marketing targeting indigenous people relied heavily on advertising (Elers, 2016; Ellis, 2006; Grigg *et al.*, 2008; Kubacki and Szablewska, 2019). Despite the frequent reliance on advertising, interviewees regularly describe social marketing as a suite of approaches that change behaviors at the individual and system level through community engagement, advocacy, policy, law and other tools (#5, #13, #18, #19). The following themes emerged most strongly from the research data: decolonizing practice; decolonizing outcomes; and decolonizing wellness. Accordingly, we present our results and discussion under these themes.

**Decolonizing (1): embedding indigenous thinking in social marketing practice**

All interviewees identified the need to develop a deep understanding of the audience and the environment for social marketing to be effective. This focus on audience insight is drawn from commercial marketing and often viewed with suspicion by the social sector (#17). However, the “deep understanding” was limited to the traditional tools of marketing. We question whether this is sufficient given the alternative worldview evident in Māori communities. #3 suggested that bringing together groups to develop a common understanding of an issue was key to good social marketing. However, this did not necessarily involve Māori audiences and thus Māori perspectives.

We found that our interviewees used international social marketing resources and added them to their existing toolkits. Yet, while a Māori social marketing conference was held in 2007 (Health Sponsorship Council, 2008), the interviewees did not identify any significant theoretical development of a Māori approach to social marketing, although some provided definitions that could include Māori approaches:

I think it’s about creating the conditions that enable transformation of communities, of people, of environments (#12).

It’s about applying whatever we have ... science, knowledge, tools... to achieve behavioral outcomes (#6).

It’s about people, not about experts, working with people and thinking of people, and making it work for people (#15).

The need for indigenous leadership was specifically identified in interviews (#9, #13, #19, #20) but only one interviewee shared examples of work that embraced both Māori models and leadership (#13).

According to our interviewees, Māori have been more successful than many indigenous cultures in having a leadership role in public health and social marketing. Practitioners saw this as one of the unique aspects of social marketing in NZ. However, participants also identified how social marketing had failed to honor Te Tiriti o Waitangi, the 1840 treaty that frames the relationships between the NZ government and the Māori population. In summarizing, the FA noted, “while Māori may have been involved as stakeholders, they have not had ownership of the programs, they have not set the outcomes or the approach”. Approaches to social marketing were thus described as being incomplete by several interviewees for whom the health behaviors being addressed by the programs are largely a product of colonization, poverty and violence. Others also expressed the view that it was wrong to expect individual behavior change without a focus on the system. Significantly, Māori practitioners focused on the strength and resources of Māori, such as the:

Depth of knowledge and skill, our talents, our connections, the fact that we are increasingly seeing Māori infrastructures and approaches, and business emerging. I feel that New Zealand has a great deal to teach the world... we are very fortunate to have a lot of leadership in the [social marketing] space, I love it! It’s a bit underground these days but I think it’s still there (#13).

In the words of whānau[kinship groups]-centered co-design specialist Tangaere (2020): Māori need to be “part of the whole process in a way that builds their confidence... that acknowledges their mana [authority, influence, prestige] .... Whānau-lead [sic] and

whānau-centered, that means we will always come up with something that the system never would have”. The lack of understanding of Māori probably contributes to social marketing’s heavy reliance on advertising. Where leadership was transformed to include Māori, diversity of practice, audience ownership of the issue and sustainability of the work were observable. In one example, moving from a transactional issue-led approach to a Māori-designed and Māori-led approach saw a move from resources and signage to a strengths-based approach that built on indigenous concepts (#13). This led to broader action that impacted on community cohesion, physical health, environmental action and cultural engagement.

### **Decolonizing (2): embedding indigenous thinking into social marketing goals and outcomes**

Most NZ European interviewees were unable to provide examples of effective social marketing for Māori. They tended to attribute this to a lack of awareness of research into the topic: “I don’t know enough to know; I don’t have the evidence” (#17) and a focus on reductionist metrics as evidence. In reflecting on effectiveness, particularly in discussion of health within Māori cultural settings, interviewees noted the difference between a Western focus on illness versus the holistic, all embracing view of wellbeing (hauora), articulated by Māori and the importance of kinship groups in understanding and promoting wellbeing. The FA also noted that selection of issues and indicators of success were driven by government agencies based on a deficit model of health. As the interviewees also observed, the measurement of effectiveness was based on government metrics (#5, #6, #7, #9, #10, #11, #12, #16, #17) and these were often at odds with what mattered to Māori.

Interviewees provided little evidence of effective social marketing for Māori as judged by Western metrics, particularly given the continuing inequity in health outcomes for

Māori. In fact, the majority of activity was national in approach and driven by media publicity, while the approaches judged as most effective were usually more grounded in communities “by Māori, for Māori” (#20). Indeed, #6 suggested that supporting Māori to identify their own needs and develop their own approaches was the most effective approach to social marketing. Māori practitioners such as #13 argued that social marketing was “effective and engaging with Māori where Māori had set the agenda and guided the process and set the outcomes”.

Social marketing seen as particularly effective for Māori had Māori input at leadership level. Two participants cited the example of the New Zealand AIDS Foundation and how it supported an annual gathering for takatāpui (people of diverse genders and sexualities within a Māori context) which created a range of community outcomes far beyond simply HIV prevention (#15, #16). Other successful examples supported Māori organizations to develop their own health improvement strategies in order to create sustainable and long-term impact (#5, #9, #13). These experiences provide evidence of the effectiveness of integrating indigenous knowledge and practice in setting goals and outcomes.

Few interviewees expressed a concern that social marketing interventions would push indigenous people into behaviors that do not fit with an indigenous mindset (#5). Instead, Māori practitioners, found good outcomes when Māori identified issues for themselves, and developed and led interventions based on a Māori worldview. These included examples that featured access to cultural resources: for example, when connecting young people with their traditional lands to improve their wellbeing (#13); and when supporting cultural festivals to integrate activities that support and promote a Māori view of wellbeing (#13). These activities deliver positive outcomes that align with decolonized approaches.

Despite good intentions, journalist Tony Wall (2021) provides a recent telling example of the persistence of the problem of poor cultural partnering which lacked Māori leadership in the “Rise and Fall of a Gang Meth Programme”. This program was aimed at Māori communities but built on overseas experience and “used Greek philosophy, poetry, film and debate to help people understand the forces inside their heads that were causing their problems with substance abuse” (Wall, 2021). The paternalistic and culturally naive approach to behavior change failed. This is just the latest in a litany of examples of programs for Māori failing to build on a Māori worldview. As interviewee #6 stated: “if you’re doing it well, if you’re applying social marketing [for Māori] there might be different levers, different tools, different intermediaries, but the same [Western-based] theories absolutely apply there”.

In the words of #13, effective social marketing displayed a “combination of public health, political will, social marketing, and then moving and changing social expectations”. Where social marketing programs were judged to be failing Māori, #15 suggested this was linked to “poor practice around the cultural competency and poor involvement”. He suggested that the sector had lost Māori capacity and competency in recent years and that developing programs with Māori organizations and doing good segmentation work was another key element of good indigenous-focused social marketing.

### **Discussion and Conclusion**

The research part of this project explored whether NZ social marketing experiences with the wicked problem of Māori health disadvantages pointed to the decolonisation of social marketing and the inclusion of indigenous approaches. The findings indicated that indigenous disadvantage is not a product of individual choice but, as was also recognized by

social marketing scholarship, was an outcome of colonization. As a result, dealing with the wicked problem of indigenous disadvantages, requires social marketing to decolonize its approaches. In addition, the NZ social marketers identified a need to move beyond individual behavior change into political and community interventions and so also aligned with the recent focus on systems thinking, attending to racism and decolonization (Hyman and Shabbir, 2020; Raciti, 2020). The specific focus on the inclusion of an indigenous worldview requires a better understanding of the Māori world and the needs of diverse Māori communities. As Reece (2020) observes, social marketing needs to learn from indigenous perspectives, and to include a focus on community level action coupled with upstream influencing. This might, for example, include outcomes of “whānau [kinship groups] self-management, healthier lifestyles, increased community participation, increased resilience, and increased participation in te ao Māori [the Māori world]” (Severinsen & Reweti, 2019, p. 292).

While there is still considerable work to do, NZ social marketers are embracing learning from the Māori world as they work to address indigenous disadvantage. For Māori, wellness does not start and finish with the human body, but concerns: “relationships between [one another], our connections, our whānau, our wairua [spirit], and the physical environment we live in” (#13). Such an enlarged perspective and a focus on kinship and the collective is at odds with current downstream approaches to social marketing. While Māori concepts and worldviews have been increasingly incorporated into the NZ health system, this has largely been at a superficial level when they can be aligned with Western health discourse. Social marketing has, largely, focused on individual behavior change and except for a small number of examples, has failed to embrace Māori knowledge or display cultural competency. Its theoretical frameworks remain anchored in Western knowledge and philosophy. The lack of



understanding of Māori probably contributes to social marketing's heavy reliance on advertising.

Māori have developed time-tested approaches to engagement, communication and relationship building (Love and Tilley, 2014), and these offer foundational elements of marketing for Māori. Indeed, imposing Western thinking on approaches involving Māori may continue colonization. Interviewee #15 also noted that social marketing could be perceived as a tool of social engineering and thus be a part of extending colonization of Māori with invasive research practices that could do further damage to communities. The recent literature suggests that the time is right to decolonize thinking and create approaches that embed indigenous models into social marketing practice. As interviewee #16 identified, social marketers needed to move beyond a one-dimensional approach to “multi-dimensional cultural approaches to improving health and wellbeing”.

From a revolutionary perspective, Māori broadcaster, political commentator and now doctor, Emma Espiner argues that NZ as a whole would be a better place if Māori were the dominant culture (2017). She suggests that a Māori paradigm would focus on every person flourishing rather than remaining with the status quo with its inequities clearly visible. Our project findings similarly indicate that embedding indigenous thinking into social marketing practice, goal setting, and theory development will enable social marketing practices to tackle indigenous disadvantages through addressing the systems that have contributed to them.

The whakatauhā or Māori proverb, “mā pango, mā whero ka oti te mahi” (by black and red together the work is done) refers to importance of collaboration and partnership between different groups. This is our challenge now and into the future and signals the end of elevating Western knowledge over indigenous knowledge and continuing work to include

both. As part of decolonizing practice and health, social marketers need to partner with indigenous communities. Collaboration can enable the development of programs that go beyond Western notions and move towards a focus on indigenous concepts of interdependence and connectedness by incorporating traditional worldviews of living systems that augment Carvalho and Mazzon's (2019) systems thinking.

Marsh and Furlong (2010) recognize that as human beings we reflect on what we are doing and make changes by acting on the findings of those reflections. Following their lead, we conclude by inviting practitioners and academics to reflect on their experience and consider what a social marketing that draws on dual worldviews could and should look like. From this project, we recommend that academics and practitioners start to change through the following five practices: by appreciating the strengths and resources of indigenous people; embracing learning from their practices and worldviews; by acknowledging social marketing's entanglement in a colonial mindset; by working out how to decolonize this mindset; and, finally, by taking action informed by the other four practices.

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## CHAPTER 7: CONCLUSION

This thesis adds evidence and insights from Aotearoa New Zealand to the body of knowledge of the discipline called social marketing. Based on Appreciative Inquiry interviews with 20 leading social marketing practitioners, and analysis of publicly available documents from the Ministry of Health and other government agencies, the thesis tells, for the first time, the unique story of the practice of social marketing in this remote, but internationally relevant, part of the world. The arguments and lessons from this research project resulted in three different articles, two of which were published in academic journals and the third is being revised for resubmission.

The articles discuss (1) Influential factors on the development of social marketing in Aotearoa New Zealand, (2) The opportunities for social change through interdisciplinary intersection between social marketing and public relations, and (3) The case for integrating Māori worldviews and knowledge into social marketing in Aotearoa New Zealand.

These three studies analysed the story of social marketing in Aotearoa from different perspectives. They form the basis for Chapters Four to Six of this thesis. Chapters Four and Five have been published in *Social Marketing Quarterly* and *Public Relations Review* respectively. Chapter Six is being rewritten for submission to a journal following feedback from peer reviewers. All three chapters drew on the same interviews, and as such, the initial version of Chapter Six lacked a Māori co-researcher and co-author. This is being addressed in the conceptual paper that is being developed.

The major question that inspired the research was: What can the social marketing discipline learn from the unique experience of social marketers in Aotearoa New Zealand?

This thesis extends considerably the published material on social marketing in Aotearoa New Zealand and provides a platform for further research in Aotearoa and overseas.

There has been little focus on the development of social marketing in Aotearoa New Zealand despite three decades of practice, although publications have focused on individual campaigns (Bauman et al., 2003; Bethune & Lewis, 2009; Crampton et al., 2011; Grigg et al., 2008; Hoek, 2015; Hoek & Jones, 2011; Kemper & Kennedy, 2021; McLean et al., 2009; Muriwai & Glover, 2016; Roguski, 2015; Thornicroft et al., 2014). This thesis is the first to focus on the emergence of social marketing as a unique area of expertise in Aotearoa New Zealand. The inattention to history is not unique to Aotearoa (Deshpande, 2019), although the evolution of the discipline within different jurisdictions and learning from practitioner insights has become relatively common in the literature since 2015 (Lagarde, 2015; Merritt et al., 2017; White, 2018). As renowned New Zealand historian Michael King put it “This is what we can be proud of – or not proud of; these are the values of our forebears that provide helpful signposts for future directions and behaviour”. This is the value that an understanding of the past offers the global and local social marketing community.

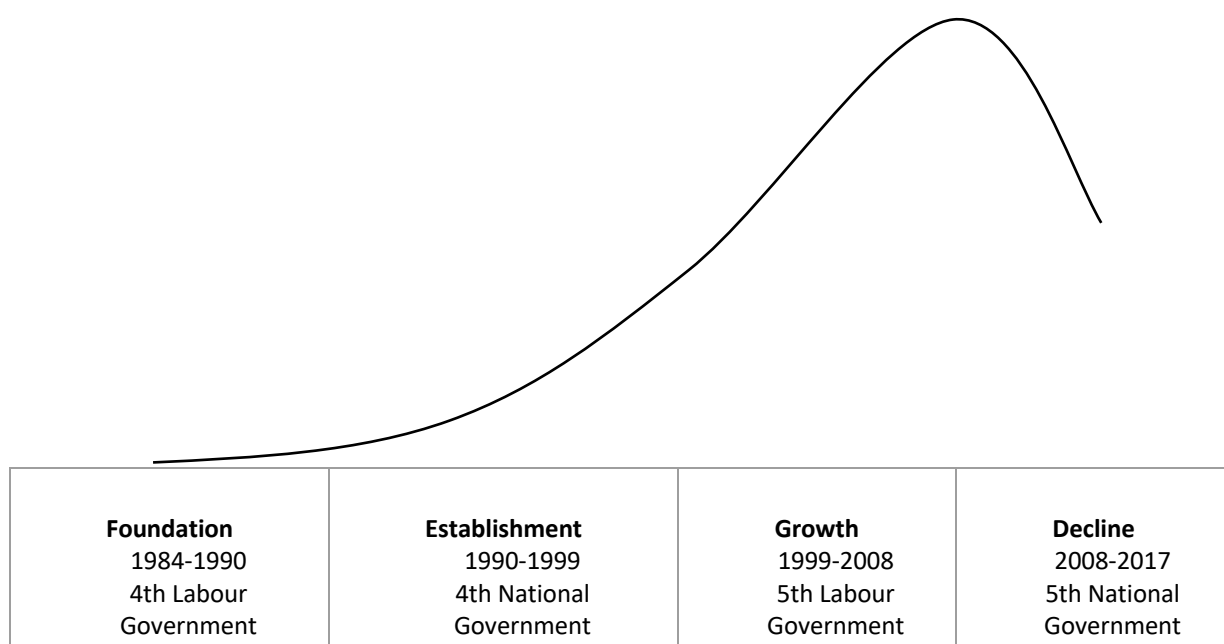
### **Learning from Practice and Politics**

Chapter Four’s article explored the emergence and evolution of social marketing as a professional practice in Aotearoa New Zealand. Social marketing emerged as a tool of choice during the neoliberal reforms of the 1980s and 1990s however as the discipline evolved to address issues beyond individual behaviour change, the very agenda that legitimised it,



delegitimised it. The impact of commercial interests in de-marketing social marketing was also apparent in this research. The impact of commercial interests was further enabled by the failure to position social marketing as a comprehensive and effective evidence-based practice. Indeed, much of the practice might be termed pseudo social marketing, where social advertising and other promotional activity were equated with social marketing further limiting the evidence base and support for social marketing outside of the practitioner community.

The study presents a developmental framework for social marketing extending through four phases, aligned with four New Zealand governments:



*Figure 3: The Rise and Fall of Social Marketing in Aotearoa New Zealand*

I have recently identified a fifth phase, Renaissance, to recognise a growing support for the practice in many government agencies since the 2017 Labour government took office. However, it was too early to determine any conclusive direction and was not included in the reported studies.

This research identified that practitioners frequently overlook comprehensive integrated strategy, including citizen insight, community engagement, data, theory, partnership and engagement, in favour of a focus on communication and promotion. Further, for social marketing to be an effective tool for social and individual change, it requires political support. This means being able to demonstrate breadth of practice and effectiveness. Social marketers described the need to maintain a focus on the upstream, the political influences, as well as the downstream individual and community change.

In Aotearoa New Zealand, social marketers have suffered from their perceived alignment with the Labour Government. This politicisation of the discipline has led to harm to individuals, communities, and society. Social marketers need to establish themselves as part of the policy agenda, to build cross-party relationships, to demonstrate value. This extends to embedding a vision for social marketing into policy documents, strategy documents and into the academy.

### **Soul Searching: Public Relations, reputation and social marketing**

Chapter Five builds on the history of social marketing presented in Chapter Four to focus on the interdisciplinary nature of social marketing in Aotearoa. Whilst academic disciplines have a tendency to isolate themselves in order to establish a jurisdiction, social marketing is stronger and more effective through having interdisciplinarity as a conscious choice. Through embracing and demonstrating interdisciplinarity, social marketing brings a social focus to the disciplines it draws from, seeking to alleviate pain and suffering in the world. The adoption of social marketing in Aotearoa New Zealand was influenced by a number of fields; public relations, marketing, advertising and health promotion held the greatest sway. Local definitions of social marketing (Bridges & Farland, 2003; Health

Sponsorship Council, 2001, 2004, 2012) recognised this, and today's consensus definition of social marketing takes the interdisciplinary nature of the field yet further. This interdisciplinary focus is of value in small nations like New Zealand.

Though social marketing was coined by marketing experts and adopted marketing principles, it is currently embracing inspiration from diverse disciplines and is building interdisciplinary practice. Now more than ever where practice is increasingly relationship focused – digitally, socially and community based – the skills and experience of public relations are woven into good social marketing. In particular, the strategic focus of public relations can be recognised for the depth it adds to social marketing practice. It is no longer enough to address a simplified marketing mix in social marketing. Contemporary social marketing is instead focused on creating value through experience, environments, systems and services. French and Russell-Bennett's (2015) hierarchical model provides space for social marketing and other disciplines to come together for a social marketing with more soul based on citizen insight, data, exchange, partnership, engagement and strategy – much like the early approaches in New Zealand.

Social marketing in Aotearoa New Zealand is also informed and shaped by Te Tiriti o Waitangi (Te Tiriti). The modern nation's founding treaty between the Crown and some hapū (tribal) leaders in 1840. Since Chapter Five was published, there has been considerable discussion of Crown failures to address special indigenous needs in the health sector. The Chapter includes discussion on the Royal Commission on Social Policy (1988) three principles of Te Tiriti: Partnership, Participation and Protection. These have since been

revised by the Waitangi Tribunal<sup>9</sup> (2019) in response to the systemic failings in the health sector. The revised principles are indigenous autonomy, partnership, active protection, equity and options. This adds to the calls to improve social marketing for Māori by ensuring Māori are in control and fully participating in programmes that meet their needs and use their own knowledge and experience. This initial discussion on social marketing and the Māori world is extended upon in Chapter Six.

### **Decolonising social marketing**

Chapter Six synthesised recent development in the social marketing literature with New Zealand social marketing practitioners' experiences to suggest ways to work more effectively with Māori. There was some evidence of support for the use of social marketing to address inequities in indigenous health outcomes. However, this was qualified by the call to move social marketers' objectives from an effort to change individual behaviour to a wider social and system change. In particular, the Chapter suggested the need to decolonise practice, outcomes and understanding of health and wellness.

There is scant evidence in the literature on the use of social marketing for indigenous health improvement and much of this lacks any critical analysis from an indigenous worldview. Indeed, the role of social marketers in colonising the thinking and behaviour of indigenous peoples must be considered. Indigenous academics have challenged the

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<sup>9</sup> The Waitangi Tribunal is a permanent commission of inquiry established under the Treaty of Waitangi Act 1975. The Tribunal makes recommendations on claims made by Māori relating to the actions of the Crown that breach Te Tiriti o Waitangi.

dominance of Western thinking and its incompatibility with indigenous worldviews. The very concept of the self, the focus of most social marketing approaches to behaviour change, is alien to many indigenous nations.

This chapter was developed without a Māori co-researcher. While sense-checking and discussions took place with Māori leaders within the Ministry of Health and other organisations, this lack of partnership was identified as an issue by peer reviewers. The language used in the paper (e.g., indigenous disadvantage, wicked problem) was drawn from the social marketing literature rather than indigenous literature and, as such, did not align with the paper's intent to advocate for social marketing to include indigenous voice and models. Further, my attempt to look beyond the New Zealand experience and to apply discussions beyond the Māori experience weakened the paper. Reviewers also identified the need to define the concept of Western.

### **Limitations and Future Research**

The studies reported in this thesis are limited to Aotearoa New Zealand, however, this specific local experience in social marketing is significant and the lessons from it are relevant globally.

Comparison studies of the impact of the political environment on social marketing in other nations would contribute to social marketing scholarship. Further studies are needed to explore the impact of political parties, ideology and systems on social marketing in other countries.

The response to this study has already been strong with presentations delivered to the New Zealand Social Marketing Network, Problem Gambling Foundation of New Zealand, Asian Family Services, and Auckland Regional Public Health Service. A paper submitted to

the International Social Marketing Conference 2020 was accepted and included in the conference programme, but unfortunately, due to the global pandemic, the conference was cancelled. Further presentations within the academic and practitioner community are planned. Engagement with academics working in other jurisdictions during the last three years might have contributed content to this thesis, particularly to Chapter Six.

This study was led and supervised by migrants to NZ that have been living there for two to three decades. Chapter Six in particular is weaker for this. The paper attempted to discuss indigenous issues rather than to focus on the Māori experience identified within the field research, particularly given the unique political environment created by Te Tiriti o Waitangi. Despite these weaknesses, one peer reviewer stated “I believe you are doing a very important piece of work, and it has a potential to define this particular conversation in the social marketing literature over the next few years”. The journal’s editor concurred, describing this as “a very important topic” that should be at the forefront of the field. Both reviewers identified the need to work with Māori academics to further develop the issues raised. A further conceptual paper co-authored with a Māori academic is now in development that will focus on Māori concepts and practice, locating these firmly within social marketing. A greater focus on the Māori worldview and concepts of the self will underpin this discussion, leading to a Māori view of social marketing.

Chapter Six called for the decolonisation of social marketing. The revised article will instead focus on indigenising social marketing – making it fit for purpose within a Māori context. The use of terminology such as “indigenous disadvantage” will also be addressed. This language was adopted from the existing social marketing literature and does not fit with current strengths-based approaches drawing on indigenous thinking.

Further, Aotearoa New Zealand is a small country and the indigenous nations (or iwi) within it share a common language and culture. This provides an advantage over similar countries with diverse indigenous languages and cultures, where a single countrywide approach will not be possible.

As noted in this thesis, social marketing has broadened in its original approach and this ties in well with indigenous views of the world – recognising the complex relationships between people, the environment, the spiritual dimension and the wider universe. Nevertheless, despite increasing calls for cultural and geographic diversity in social marketing thinking, the field is dominated by English-speaking Western expert scholars and practitioners from the United States, Australia and the United Kingdom.

### **Conclusion and recommendations**

The experience of social marketing in Aotearoa New Zealand provides useful and insightful lessons for the discipline of social marketing:

1. Political power has a key role to play in social marketing – this requires ongoing engagement across the political spectrum and evidence for social marketing interventions' outcomes.
2. Commercial interests can influence support for social marketing. Advocacy for the discipline needs to be a focus for social marketing communities of practice.
3. Interdisciplinarity is key to the ongoing success of social marketers. Practitioners from different backgrounds and with different training are needed within this comprehensive approach to influence change.

4. Applying social marketing to indigenous peoples without the inclusion of their voices, their models and their perspectives is a further attempt to colonise indigenous spaces. Social marketing can benefit from the inclusion of indigenous approaches.

Personally, I have practiced social marketing in New Zealand for 20 years and have witnessed the discipline evolve and change. New Zealand social marketing practitioners drove my work and inspired me. I was deeply familiar with the industry I investigated and exploring it from new perspectives extended my understanding and commitment to it significantly.



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## **APPENDIX 1: INTERVIEW GUIDE**

1. Can you tell me about a time in your social marketing career when you felt excited, joyful or at the peak of your form?
2. Tell me about your beginnings in social marketing, how you became interested in the field and, perhaps, what excites you about it.
3. What do you value most about social marketing? Why?
4. From your experience and knowledge, what do you think have been the key steps in the development of social marketing in New Zealand?
5. How do you think, if at all, government policy and political leadership has impacted on social marketing?
6. Has social marketing been effective in engaging with Maori?
7. What fields do you believe have most influenced the development of social marketing in New Zealand?
8. When you think of New Zealand social marketing, what is unique about it?
9. Do you think any particular campaigns made a real difference to the field?
10. Has evidence of social marketing success been gathered and shared across NZ practitioners? If so – how?
11. What tools do you most value in measuring the effectiveness of social marketing? Why?
12. How do you feel we should share and celebrate the success of social marketing?
13. Given all we've talked about, how do you define social marketing?
14. Looking to the future, what do you think social marketing and related fields have to offer New Zealand?

15. Who do you feel are the people I should be talking to, to best understand social marketing in New Zealand – past and present?
16. Anything else you'd like to share?

## **APPENDIX 2: CO-AUTHORSHIP FORMS**

### **Declaration**

For all publications, my supervisors and I were involved in conceptualising the research and in refining the overall direction. I initiated the interviews, collected data and conducted the analysis. I wrote the first draft of the article. My supervisors commented and edited the drafts and we continued discussing and editing until we agreed on the final version to be submitted to the journals. The published articles have been reviewed and edited by journal reviewers and editors.



## Co-Authorship Form

Postgraduate Studies Office  
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Chapter 4: Learning from practice and politics: The rise and fall of social marketing in New Zealand (1984-2017).  
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Nature of contribution  
by PhD candidate

Co-conceptualised, collected data, conducted analyses and did first draft

Extent of contribution  
by PhD candidate (%)

70%

### CO-AUTHORS

Name	Nature of Contribution
Margalit Toledano	Co-conceptualised, conducted analyses and worked on drafts and final submission
David McKie	Co-conceptualised and worked on drafts

### Certification by Co-Authors

The undersigned hereby certify that:

- ❖ the above statement correctly reflects the nature and extent of the PhD candidate's contribution to this work, and the nature of the contribution of each of the co-authors; and

Name	Signature	Date
David McKie	<i>D McKie</i>	16 August 2021
Margalit Toledano	<i>Margalit Toledano</i>	16 August 2021



## Co-Authorship Form

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Chapter 5: Soul searching: Public relations, reputation and social marketing in an age of interdisciplinarity. Published in Public Relations Review Volume 45, Issue 5, December 2019. pp. 101827

Nature of contribution  
by PhD candidate

Co-conceptualised, collected data, analysed and did first draft

Extent of contribution  
by PhD candidate (%)

70%

### CO-AUTHORS

Name	Nature of Contribution
Margalit Toledano	Co-conceptualised, analysed and edited drafts
David McKie	Co-conceptualised and edited drafts

### Certification by Co-Authors

The undersigned hereby certify that:

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Name	Signature	Date
Margalit Toledano		16th August 2021
David McKie		16 August 2021



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Chapter 6: Decolonising social marketing: Indigenous knowledge and NZ practitioner experience. Not published, currently being reworked for submission

Nature of contribution  
by PhD candidate

Co-conceptualised, collected data, analysed and did first draft

Extent of contribution  
by PhD candidate (%)

70%

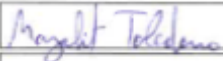
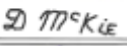
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